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Teacher policy in England: an historical study of responses to changing ideological and socio-economic contexts

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**TEACHER POLICY IN ENGLAND: AN HISTORICAL
STUDY OF RESPONSES TO CHANGING
IDEOLOGICAL AND SOCIO-ECONOMIC CONTEXTS**

UN YONG JEONG

A thesis submitted for the degree of Doctor of Philosophy

University of Bath

Department of Education

July 2009

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Abstract

This research aims to explain teacher policy developments in England since the nineteenth century, using a historical approach. To this end, this research has demarcated the scope of teacher policy, in consideration of the main career phases of regular teachers, into three policy areas – initial teacher training, curriculum and teaching, and employment and professional development – and has divided the whole period of 1800-2008, in consideration of major political changes and the management of the research, into four periods of governments: early era governments (1800-1943), post-war era governments (1944-1979), Thatcherite governments (1979-1997), and New Labour governments (1997-2008). Teacher policy in each period has been explained in accordance with an analytical framework employing concepts of historical-institution legacies (HILs), interlinking-institution legacies (IILs), government strategies, political ideologies and socio-economic situations, devised largely on the basis of the perspectives of historical institutionalism and the state-centred approach.

Teacher policy in the early era governments has been explained in terms of HILs developed to address the long-lived effects of early institutions on subsequent policies over time. The changing pattern of teacher policy during the period of government change in the last three periods has been explained in terms of IILs. This research suggests certain teacher policies in the early era governments have had a strong effect on subsequent policies, consistently or intermittently, in the form of revival. For example, apprenticeship instituted as an early form of school-based teacher training has reflected its legacy in subsequent policies such as SCITT and employment-based training. This research has found that, as IILs, striking changes in certain policies have already started before government change. Furthermore, this research argues that the three groups of governments have employed their own strategies under different political ideologies and socio-economic situations, and that most teacher policies have been made in line with their strategies.

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List of Abbreviations

ACAS	Advisory Conciliation and Arbitration Service
ACSET	Advisory Committee on the Supply and Education of Teachers
ACSTT	Advisory Committee on the Supply and Training of Teachers
ALI	Adult Learning Inspectorate
APU	Assessment of Performance Unit
ATCDE	Association of Teachers in Colleges and Departments of Education
ATL	Association of Teachers and Lecturers
ATO	Area Training Organisation
ATS	Articled Teacher Scheme
AVCE	Advanced Vocational Certificate of Education
BA	Bachelor of Arts
BEd	Bachelor of Education
BFI	Benefit Fraud Inspectorate
BoE	Board of Education
BSc	Bachelor of Science
CACCT	Central Advisory Committee for the Certification of Teachers
CACE	Central Advisory Council for Education
CATE	Council for the Accreditation of Teacher Education
CCa	Clarendon Commission
CCb	Cross Commission
CFAS	Centre for Formative Assessment Studies
CHE	Committee on Higher Education
CLEA/ST	Council of Local Education Authorities/Schoolteachers' Committee
CNAA	Council for National Academic Awards
CNE	Committee on National Expenditure
CO	Cabinet Office
CPCE	Committee of the Privy Council on Education
CPD	Continuing Professional Development
CPVE	Certificate of Pre-vocational Education
CSE	Certificate of Secondary Education
CTC	City Technology College
DCSF	Department for Children, Schools and Families
DE	Department of Employment
DEA	Department of Economic Affairs
DENI	Department of Education Northern Ireland
DES	Department of Education and Science
DETR	Department of the Environment, Transport and the Regions
DfE	Department for Education
DfEE	Department for Education and Employment
DfES	Department for Education and Skills
DipHE	Diploma of Higher Education
DoE	Department of the Environment
DoH	Department of Health
DRB	Designated Recommending Body

DSA	Department of Science and Art
DSS	Department of Social Security
DTI	Department of Trade and Industry
EAZs	Education Action Zones
EBITTP	Employment-Based Initial Teacher Training Provider
EBR	Employment-Based Route
ED	Education Department
EiCs	Excellence in Cities
ESG	Education Support Grant
EYFS	Early Years Foundation Stage
FAS	Funding Agency for Schools
FE	Further Education
GCE	General Certificate of Education
GCSE	General Certificate of Secondary Education
GDP	Gross Domestic Product
GEST	Grants for Education Support and Training
GM	Grant-Maintained
GNVQ	General National Vocational Qualification
GRIST	Grant Related In-Service Training
GTC	General Teaching Council
GTCE	General Teaching Council for England
GTP	Graduate Teacher Programme
HCESC	House of Commons Education and Skills Committee
HCPP	House of Commons Parliamentary Paper
HE	Higher Education
HEADLAMP	Headteacher Leadership and Management Programme
HEFCE	Higher Education Funding Council for England
HEI	Higher Education Institution
HILs	Historical-Institution Legacies
HLTAs	High Level Teaching Assistants
HMCI	Her Majesty's Chief Inspector
HMCPsI	Her Majesty's Crown Prosecution Service Inspectorate
HMI	Her Majesty's Inspectorate
HMT	Her Majesty's Treasury
HRM	Human Resource Management
HSC	Higher School Certificate
IAC	Interim Advisory Committee
ICT	Information and Communication Technology
IILs	Interlinking-Institution Legacies
iNet	International Networking for Educational Transformation
INSET	Inservice Education and Training
IRU	Implementation Review Unit
IT	Information Technology
ITT	Initial Teacher Training

JCGO	Joint Council for General Qualifications
LEA	Local Education Authority
LEATGS	Local Education Authority Training Grants Scheme
LGNT0	Local Government National Training Organisation
LMS	Local Management of Schools
LPSH	Leadership Programme for Serving Heads
LTS	Licensed Teacher Scheme
MCI	Management Charter Initiative
MoE	Ministry of Education
MP	Member of Parliament
MSC	Manpower Services Commission
NACCCE	National Advisory Committee on Creative and Cultural Education
NACTST	National Advisory Council on the Training and Supply of Teachers
NAHT	National Association of Head Teachers
NAS	National Association of Schoolmasters
NASUWT	National Association of Schoolmasters Union of Women Teachers
NBPI	National Board for Prices and Incomes
NC	Newcastle Commission
NCC	National Curriculum Council
NCE	National Commission on Education
NCSL	National College for School Leadership
NCTET	National Council for Teacher Education and Training
NCVQ	National Council for Vocational Qualifications
NDPB	Non-Departmental Public Body
NEB	National Enterprise Board
NEDC	National Economic Development Council
NEOST	National Employers' Organisation for School Teachers
NFER	National Foundation for Educational Research
NFWT	National Federation of Women Teachers
NHS	National Health Service
NLNS	National Literacy and Numeracy Strategies
NMW	National Minimum Wage
NOS	National Occupational Standards
NPM	New Public Management
NPQH	National Professional Qualification for Headship
NQT	Newly Qualified Teacher
NRT	National Remodelling Team
NSG	National Steering Group
NVQ	National Vocational Qualification
NUET	National Union of Elementary Teachers
NUM	National Union of Mineworkers
NUT	National Union of Teachers
NUWT	National Union of Woman Teachers
OECD	Organisation for Economic Co-operation and Development
Ofsted	Office for Standards in Education
OPSR	Office of Public Services Reform

OTTP	Overseas-Trained Teacher Programme
PAT	Professional Association of Teachers
PB	Pay Board
PC	Price Commission
PCFC	Polytechnics and Colleges Funding Council
PE	Physical Education
PF	Primary Framework
PGCE	Postgraduate Certificate in Education
PM	Performance Management
PNS	Primary National Strategy
PRP	Performance-Related Pay
PSR	Post of Special Responsibility
PwC	PricewaterhouseCoopers
QAAHE	Quality Assurance Agency for Higher Education
QCA	Qualifications and Curriculum Authority
QTS	Qualified Teacher Status
RB	Recommending Body
RCCDEs	Regional Councils for Colleges and Departments of Education
RIG	Rewards and Incentives Group
RPI	Retail Price Index
RSG	Rate Support Grant
RTP	Registered Teacher Programme
SC	School Certificate
SCAA	School Curriculum and Assessment Authority
SCCE	Schools Council for Curriculum and Examinations
SCDC	School Curriculum Development Committee
SCITT	School-Centred Initial Teacher Training
SCPC	Standing Commission on Pay Comparability
SCUE	Standing Committee for University Entrance
SEAC	School Examinations and Assessment Council
SEC	Secondary Examinations Council
SHA	Secondary Heads Association
SPCK	Society for Promoting Christian Knowledge
SSAT	Specialist Schools and Academies Trust
SSEC	Secondary Schools Examinations Council
STRB	School Teachers' Review Body
TC	Taunton Commission
TDA	Training and Development Agency for Schools
TF	Teach First
TFA	Teach For America
TGWU	Transport and General Workers Union
TPDs	Teacher Policy Developments
TRIST	TVEI Related In-Service Training
TQM	Total Quality Management
TTA	Teacher Training Agency

TUC	Trades Union Congress
TVEI	Technical and Vocational Education Initiative
UCET	Universities Council for the Education of Teachers
UDEs	University Departments of Education
UFC	Universities Funding Council
UGC	University Grants Committee
UVP	Unified Vocational Preparation
WAG	Welsh Assembly Government
WAMG	Workforce Agreement Monitoring Group
WO	Wales Office
YOP	Youth Opportunities Programme
YTS	Youth Training Scheme

Chapter 1: Introduction and Analytical Framework

1.1. Research Background

The educational system in England has developed through consistent reforms since the inception of elementary schools for late eighteenth century working class children. In the first half of the nineteenth century, the state began to intervene in education as the expansion of education occurred at elementary level. Since then, education has gradually become positioned as a central priority in the policy agenda, in parallel with the growing budget for education. At the same time, the need for policies on teachers was enlarged alongside the expansion of education. Since the start of state intervention in education, a number of policies on teachers have been made by different governments under different circumstances. This research attempts to explain the developments and changes in these policies on teachers, using a historical approach.

1.1.1. Shaping teacher policy into a theme of study in England

This research deals with the theme of teacher policy, which may be considered to be part of educational policy and has taken a large number of forms and variations over almost two centuries since state intervention in education. Although there are some studies which address these educational policies with a historical approach such as Chitty (2004), Lawton (2005) and Fitz et al. (2006), it is difficult to find studies dealing with these educational policies in terms of teacher policy. To date, I have seen only one study which has been written in this respect in England: an OECD Country Background Report (Ross and Hutchings, 2003). Some studies partly address teacher policy with regard to initial teacher education (Alexander et al., 1984; Furlong et al., 2000), the school curriculum (Lawton, 1980; Ross, 2000) and the teaching profession (Gosden, 1972); however, they were not written with an explicit focus on the concept of teacher policy, which helps to arrive at a comprehensive understanding of broad policy areas related to teachers and the teaching profession. Teacher policy has been

widely used in studies outside England (see Darling-Hammond and Berry, 1988; McDonnell, 1989; OECD, 1979; 2005), but it seems not to have been used as a theme or framework of study among scholars in England. This is the starting point to explain why I have chosen teacher policy in England as a theme for my research. In addition, very few previous studies have addressed policies with a long-term historical perspective from the inception of state intervention in education up to the present day. This research is distinctive from previous studies since it attempts to address ‘teacher policy’ in England, employing a long-term historical approach.

1.1.2. Explaining teacher policy developments

This research aims to explain teacher policy developments (TPDs) in England since the nineteenth century, using a historical approach. To this end, I will initially demarcate policy areas which should be included in teacher policy, along with the definition of teacher policy. As noted, teacher policy has been widely employed as a theme of study outside England, but it is not easy to come across the definition of teacher policy, even in these studies. This is not unusual when one considers that scholars have been more concerned with the policy areas included in teacher policy rather than the definition of teacher policy itself. However, a clear definition of teacher policy will help demarcate the areas which can be included within it. In this research, teacher policy is defined as a range of policies, made by central government (including its quangos), which are directly related to, or have a direct impact on, teachers and the teaching profession. Policies can be made at every level of administration, but this research focuses on the policies made by central government. Additionally, most educational policies are more or less related to, or have implications for, teachers or the teaching profession, but this research focuses on the policies which can directly influence the work, status and interest of teachers and their profession (see Figure.1.1 below). Under this definition, the areas of teacher policy to be addressed in my research will be specified in the subsequent pages.

Teacher policy developments and changes do not take place in a vacuum, so they should be understood in the broader context of political and socio-economic situations. The breadth of teacher policy has been consistently widened in line with the incessant

expansion of demands from society and industry. In order to effectively analyse and explain the central developments and changes in teacher policy, I will develop an analytical framework based on the perspectives of a state-centred approach and historical institutionalism. The concepts of historical-institution legacies (HILs) and interlinking-institution legacies (IILs) will be used as the key components of this analytical framework, alongside the concept of government strategies under certain political ideologies and socio-economic situations. This framework will be addressed in detail in the subsequent pages. In sum, this study will provide two important contributions to educational research. First of all, this thesis will be one of the first studies on teacher policy in England with a long-term historical view. Secondly, this research will provide a comprehensive understanding of teacher policy in England by explaining the main teacher policy developments, using an analytical framework which covers wide-ranging factors such as institutional legacies, government strategies, political ideologies, and socio-economic situations.

1.2. Research Scope

1.2.1. England since the nineteenth century

The United Kingdom of Great Britain and Northern Ireland, commonly known as the UK or Britain, is a union of four constituent countries: England, Northern Ireland, Scotland and Wales. Scotland has continued with its own educational system, even though it was united with England in 1707 by the Acts of Union. As a result of the Blair government's devolution policy, Scotland came to have its own parliament, through the Scotland Act 1998, and became more independent, although it is not a separate sovereign state. Northern Ireland and Wales also have a devolved, unicameral legislature and their own executive. England is the largest country within the UK, but has no devolved executive or legislature and is ruled and legislated for directly by the UK government and Parliament. This study focuses on teacher policy in England only, although it should be noted that policies for England were directly

applied to Wales until the National Assembly for Wales was established by the Government of Wales Act 1998.

This study deals with policies made by central government, which began to intervene in education at primary and secondary levels in the first half of the nineteenth century with the appointment of the Committee of the Privy Council on Education in 1839 (Horn, 1979: 29). The period from this stage to present day will be divided into four phases: from the nineteenth century to the Second World War; the post-war era until 1979; the 18-year period of Conservative rule; and the New Labour administration until 2008. In dividing history into these periods, I have considered two aspects. The first is the consideration of major political changes and political ideologies, which will be addressed in detail in Chapter 2. The division of the last three phases largely reflects this aspect. The second aspect concerns the management of the study. The first or second phases can be divided into more than one phase, but there needs to be a reduction in the number of phases in order to conduct the study effectively within the given time and word limit. Under these considerations, teacher policy in the first period will be analysed in terms of HILs devised to explain the policy legacies which have had a long-term historical effect on the subsequent process of policy making, and teacher policy in the last three periods will be more minutely addressed.

1.2.2. Teacher Policy

Although teacher policy has been widely employed as a theme of study by researchers outside England, different researchers have adopted different positions on the scope of teacher policies. Darling-Hammond and Berry (1988) analysed teacher policy in the USA in terms of teacher professionalism, teacher certification and teacher compensation. The OECD employed a broader approach to teacher policy: the 1979 publication deals with teacher policy in terms of teacher recruitment, teacher training, teacher supply and demand, teacher politics, and teacher tasks (OECD, 1979). This was further elaborated on by the 2005 publication which addresses teacher policy from four perspectives: making teaching an attractive career choice; developing teachers' knowledge and skills; recruiting, selecting and employing teachers; and retaining effective teachers in schools (OECD, 2005). As we can see from the studies

above, the scope of teacher policy can be flexible according to the perspectives of researchers. However, any scope of teacher policy employed by researchers should be clear and help to provide a comprehensive understanding of a range of policies related to teachers. With this in mind, I have provided a new framework to demarcate the scope of teacher policy.

Figure 1.1 The scope of teacher policy

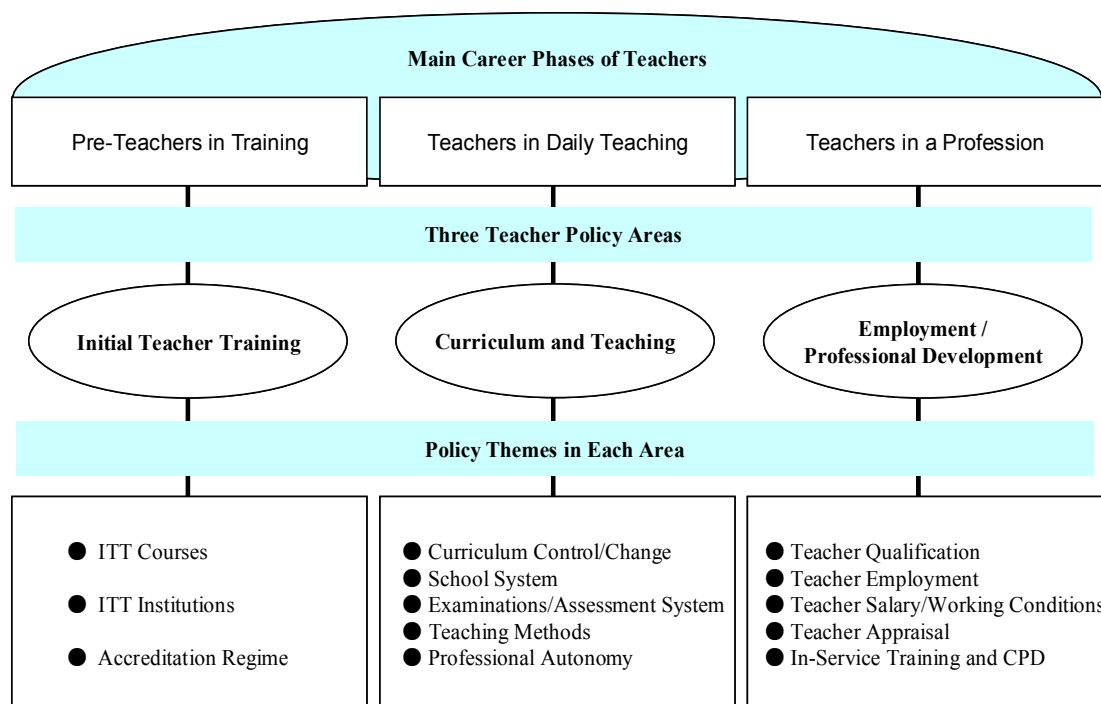


Figure 1.1 demonstrates the framework devised for this study, which draws on my professional experience in working as an educational administrator in Korea. As seen above, this framework consists of three broad teacher policy areas: initial teacher training, curriculum and teaching, and employment and professional development. These policy areas have been established from the three phases that regular teachers experience during their teaching career. In addition, each of the three teacher policy areas has its own policy themes which are considered as core components of its policy area. These three teacher policy areas overlap each other in practice. For instance, initial teacher training for pre-teachers is partially a process of teacher qualification and employment and its programmes and operation are strongly related to the school curriculum and teaching. For analytical purposes, however, I have demarcated the scope of teacher policy into these three distinct areas which help make this historical

study manageable by providing a useful analytical framework and a reduction in complexity through the clarification of teacher policy areas and themes. In this study, I focus on the three teacher policy areas rather than the policy themes in each area. This means that this study does not attempt to explain each one of these policy themes individually. Instead, each of these policy themes will be addressed in the course of explaining the TPDs of these three areas, with the use of a long-term historical approach.

1.3. Research Questions

Based on the research background and scope, this thesis will aim to explain distinctive TPDs in England since the inception of state intervention in education. The following inter-related research questions will be asked in the course of the research:

1. How has teacher policy in England been developed historically in terms of initial teacher training, curriculum and teaching, and teacher employment and professional development?
2. What are the reasons for these TPDs in terms of government strategies in certain political ideologies and socio-economic situations?
3. What legacies are influential in governments formulating future policies in terms of HILs and IILs?

1.4. Research Methodology

The concept of methodology is often taken to imply the tools employed to collect data, along with the two main families of qualitative and quantitative research strategies. However, it should be noted that the concept implies more than this. Methodology entails the whole process of carrying out a study or doing research aimed at capturing or understanding a social phenomenon (Creswell, 1994). In this section, I focus on the research strategy and data collection, whilst the analytical framework for this study will be addressed in the subsequent section.

1.4.1. Case-oriented historical approach

This research is a single case study with a historical approach. Skocpol (1984: 362-386) illustrates three major research strategies for bringing history and theoretical ideas to bear on one another: applying a general model to history, using concepts to interpret history and analysing causal regularities in history. Each of these strategies may be applied to a single historical case, or to two or more historical cases. Judged from Skocpol's perspective, this study can be regarded as a single case study employing an interpretative research strategy, in that it attempts to explain distinctive TPDs in England using a historical approach. As Ragin (1987: 3) states, this historically-oriented interpretative research strategy is a type of empirical social science, since it attempts to 'account for specific historical outcomes or sets of comparable outcomes or processes chosen for study'.

However, single-case studies employing this historically oriented interpretative research strategy can be criticised by social scientists concerned with general theoretical knowledge having causal validity. From their perspective, those employing this interpretative historical approach 'can almost always be faulted for their insouciance about establishing *valid* explanatory arguments' because they are 'not concerned to establish explanations that hold good across more than single cases' (Skocpol, 1984: 372). In truth, there is a danger for the interpretative historical approach to fall into story-telling or historical narrative. Therefore, researchers employing the approach should be cautious in designing their research.

To avoid these risks, I have developed an analytical framework which helps to provide historically interpretative, causally analytical explanations of teacher policy in England. An analytical framework for research is more useful when it is composed of clearly defined concepts. The analytical framework developed for this study consists of some clearly operationalised concepts, largely based on the perspective of historical institutionalism and the stated-centred approach: HILs, IILs, government strategies, political ideologies, and socio-economic situations (see section 1.5 below). These concepts are deductive in that they are used to explain relevant causal patterns between previous and subsequent policies. With this analytical framework, this study attempts to provide historical interpretations of distinctive developments and changes

in teacher policy, and seeks to develop causally analytical explanations which can contribute to facilitating further theoretical development in the study of teacher policy in England.

1.4.2. Teacher policy documents

As Ragin (1987: 3) points out, the interpretative historical approach seeks to account for significant historical outcomes and processes ‘by piecing evidence together in a manner sensitive to chronology and by offering limited historical generalizations that are both objectively possible and cognizant of enabling conditions and limiting means of context’. Hence, collecting and selecting data for study can be regarded as an important process of research. This study focuses on teacher policy made by central government, and the scope of teacher policy for this study has been mentioned previously. Policies may take many different forms, but ultimately they have to be documented.

There have been a wide variety of policy documents since the nineteenth century which can be classified into the teacher policy genre in England. Not all of them, however, can be addressed in this single study. This study uses policy documents issued by central government, including its quangos, as a primary source of data, which can be classified into four categories: consultation papers, including Green and White papers; legislation; various statutory and non-statutory documents meant as guidelines; and other governmental reports and publications for policy information. As a secondary source of data, this study also uses official statistics, reports and comments from stakeholders, comments in magazines and newspapers, speeches by ministers, and many theses, books and journals. In particular, a number of the previous studies and explanations in books and journals are referred to extensively in this research. Several websites belonging to governmental and other organisations are used as an important source of data for this study.

Concerning data collection, it is particularly worth noting that the process of selecting and approaching primary data sources in that this process may have a crucial effect on the manageability and quality of this study. Many of the key teacher policy documents

selected in this study have been identified through an extensive review of previous studies, which facilitated identification of those documents that were seen to have particular significance for the overall analysis of teacher policy and for teacher policy in each of the three areas identified. After selecting the key documents related to certain policies, I gained access to them through various means such as library loans, interlibrary loans, personal purchase, and internet web-sites. In particular, several government websites and those from other organisations have been used as an important way of approaching the primary data sources. Among them, the website of the House of Commons Parliamentary Papers (HCPP)¹, accessed through library databases, acted as a primary provider of a large number of original policy documents from the nineteenth century, which would otherwise have been difficult to access, such as command papers, annual education department reports and special parliamentary committees' reports. These were all available and downloaded in PDF file format.

1.5. An Analytical Framework

This section provides an analytical framework that will be used to explain the process of TPDs. Before presenting the framework, some of the perspectives and theories that comprise the theoretical underpinnings of this study will be discussed, including perspectives on the state and power in the policy process. Teacher policy is part of educational policy, and educational policy is a major part of public policy. Therefore, teacher policy also should be analysed within its complex political context. For political scientists, the distribution and access to power in society has been a central concern in understanding politics. Here, perspectives on the state and power in the policy process include the society-centred approach, the state-centred approach and historical institutionalism.

1.5.1. Perspectives on the state and power in the policy process

¹ <http://parlipapers.chadwyck.co.uk/>

1.5.1.1. Society-centred approach

Pluralism and neo-Marxism, prominent views in political science from the 1950s to the 1970s, can be categorised into a society-centred approach in the sense that their main concern is with society rather than the state itself. Pluralism was philosophically shaped by its basic notion that ‘reality cannot be explained by one substance or principle’ (Dunleavy and O’Leary, 1987:13); therefore, any difference or diversity in society acts as a core factor in pluralism. Pluralism placed a continuous emphasis on the role of interest groups in understanding politics; Bentley (1995: 200) argues that ‘the analysis of politics is the analysis of groups because the society itself is nothing other than the complex of the groups that compose it’.

Pluralists believe that political power in society is distributed between a wide range of groups without concentration. Robert Dahl (1961: 24), a representative pluralist, argues that ‘there are multiple centres of power, none of which is wholly sovereign’. Within the pluralist paradigm, there is a substantial separation between the state and society, since the notion of the state in pluralism is represented as ‘a set of institutions such as the executive, legislature, civil service and judiciary that are distinct from civil society’ (Smith, 1995: 211). For pluralists, the state is neutral and the principal role of the state is to adjust or harmonise conflicts between groups in society rather than to dominate society with no particular interests. The policy process in the state is also understood in line with this perspective; namely, for pluralists, public policy is nothing more than a response of the government or political system as a coordinator for the various pressures of groups in society.

Marxism, with its neo-versions, is another society-centred approach. As with pluralists, Marxists consider society as more important than the state in the policy process. However, Marxists do not adopt the pluralists’ assumption that political power is widely dispersed to many groups in a society. Instead, they believe that there are particular classes in a capitalist society that exert powerful influence in politics. In this sense, Marxists argue that any kind of public policy created by the state eventually plays an active role in favouring capitalism and capitalists. This view is based on Marx’s recognition that ‘the state is an executive committee for managing the common affairs of the whole bourgeoisie’ (Marx, 1977: 223). He sees the state as

an instrument serving the interests of the ruling class, so that the state can only have limited autonomy in the policy process.

From a neo-Marxist perspective, Poulantzas, known in the 1970s as a leading Structural Marxist along with Althusser, disagrees with the instrumental approach to the role of the state. He believes the state not only has substantial autonomy from the capitalist class in the policy making process, but it also benefits the class in the long run through ensuring the smooth operation of a capitalist society (Poulantzas, 1969; 1973). Gramsci (1971: 244) argues that the state consists of the 'entire complex of political and theoretical activities with which the ruling class not only justifies and maintains its dominance, but manages to win the active consent of those over whom it rules'. Under this class struggle approach, the state has significant autonomy, but along with the capitalist class it has to consider the working class in the policymaking process so that the change in state policy becomes closely connected with the evolving relationship between social classes. Marxism provides 'the best guidance for determining the most significant macro-level variables affecting a political economic system' (Levi, 1988: 34). However, its society-centred assumptions that all political outcomes are shaped by the interests of the capitalist class fail to recognise the variety of dimensions of the policymaking process in the state.

1.5.1.2. State-centred approach

Pluralists and neo-Marxists are intrinsically more interested in society rather than the state itself. In pluralism, the state is seen as a coordinator between interest groups rather than an independent actor. In neo-Marxism, the state is nothing more than an arena in which social classes make demands and are engaged in political struggles or compromises. In contrast, scholars advocating a state-centred approach argue that the state should be recognised as an autonomous entity which has its own interests and goals, and has its own capacities to achieve them through a variety of policy instruments, criticising pluralism and neo-Marxism for over-dependence on the social factors in analysing politics. The state-centred approach has its roots in the Weberian view that 'states are compulsory associations claiming control over territories and the people within them' (Skocpol, 1985: 7). This approach came into being as a reaction to the pluralist and structural-functionalist perspectives, predominant in the USA during the 1950s and 1960s, in which the state was regarded as an old-fashioned

concept. In addition, the emergence of this state-centred approach reflects ‘the growth of the size of the public sector in Western democracies after 1945, in large part associated with welfare state programs and Keynesian economic policy’ (Peters et al., 2005: 1279).

In this context, the publication of *Bringing the State Back In* (Evans et al., 1985) perfectly illustrates the effort involved in this approach, and the notions of state autonomy and state capacities are useful in understanding it. Skocpol (1985: 9) argues that the state has its own autonomy as an actor because ‘states formulate and pursue goals that are not simply reflective of the demands or interests of social groups, classes, or society’. Reschemeyer and Evans (1985: 47) see the state as ‘a set of organisations invested with the authority to make binding decisions for people and organizations juridically located in a particular territory and to implement these decisions using, if necessary, force’. In the state-centred approach, state capacities include the concept of the policy instrument, referring to the relevant means that a state may have at its disposal. From this perspective, the public policymaking process is predominated by ‘organizationally coherent collectivities of state officials, especially collectivities of career officials relatively insulated from ties to currently dominant socio-economic interests’ (Skocpol, 1985: 9).

The state-centred approach has greatly contributed to bringing the state back into the studies of policymaking process, but this approach has also some limitations concerning its prepositions of state autonomy and state capacity. The state-centred approach regards the state as a separate entity from a larger entity known as ‘society’ (Mitchell, 1991: 77). However, it cannot be imagined that public policy is made in a vacuum, being insulated from social actors. In the state-centred approach, it tends to be believed that the state autonomy is stable. In practice, the state autonomy is fluid, especially when the power of business increasingly strengthens. It is indicated that the state cannot be free from the structural limitations in the policy process because the state should keep ‘business confidence’ (Block, 1977).

1.5.1.3. Historical Institutionalism

Although new institutionalism has a number of variants, it consists largely of three schools of thought: historical institutionalism, rational choice institutionalism and

sociological institutionalism, all of which seek to ‘elucidate the role that institutions play in the determination of social and political outcomes’, despite their different views of the political world (Hall and Taylor, 1996: 936). Historical institutionalism emerged in the 1980s as rational choice institutionalism, and developed in response to the group theories of politics and structural-functionalism, i.e. variants of pluralism and neo-Marxism, prominent in political science during the 1960s and 1970s. Historical institutionalists took some ideas from pluralism and neo-Marxism. They accepted the contention of pluralists that conflict among rival groups for scarce resources lies at the heart of politics. Additionally, they employed the notion of structuralism from neo-Marxism, and saw institutions as the principal factor that structures collective behaviour and generates distinctive political outcomes.

However, it is the state-centred approach that had a more critical effect on the development of historical institutionalism in that many historical institutionalists saw the state as a complex of institutions capable of structuring the character and outcome of group conflict (Krasner, 1978; Katzenstein, 1978; Evans et al., 1985). Nevertheless, historical institutionalism is different from the two previous approaches – the society-centred and state-centred approaches – in that it concentrates on the interactions between the state and society rather than exclusively focusing purely either on society or the state. As for historical institutionalists, the state is neither a neutral broker nor a capitalist agent, and so the traditional dichotomy between the state and society in pluralism and Marxism becomes discarded in historical institutionalism (Shin, 2003: 37). Hall and Taylor suggest four major historical institutionalist features, which are relatively distinctive from the other two schools of new institutionalism:

First, historical institutionalists tend to conceptualize the relationship between institutions and individual behaviour in relatively broad terms. Second, they emphasize the asymmetries of power associated with the operation and development of institutions. Third, they tend to have a view of institutional development that emphasizes path dependence and unintended consequences. Fourth, they are especially concerned to integrate institutional analysis with the contribution that other kinds of factors, such as ideas, can make to political outcomes.

(Hall and Taylor, 1996: 938)

The definition of ‘institutions’ is important when attempting to understand the perspective of historical institutionalists on the policy process. In ‘old institutionalism’, institutions were perceived as material structures such as constitutions, cabinets, parliaments, bureaucracies, courts, armies, federal or autonomy arrangements, and party systems (Lecours, 2005: 6). In other words, institutions were considered as the state or government. In defining institutions, historical institutionalists tend to include formal organisations and informal rules, procedures and conventions. For them, institutions are largely understood as ‘the formal or informal procedures, routines, norms and conventions embedded in the organizational structure of the polity or political economy’ (Hall and Taylor, 1996: 938). From their perspective, institutions can ‘shape and constrain political strategies in important ways, but they are themselves also the outcome (conscious or unintended) of deliberate political strategies, of political conflict, and of choice’ (Thelen and Steinmo, 1992: 10).

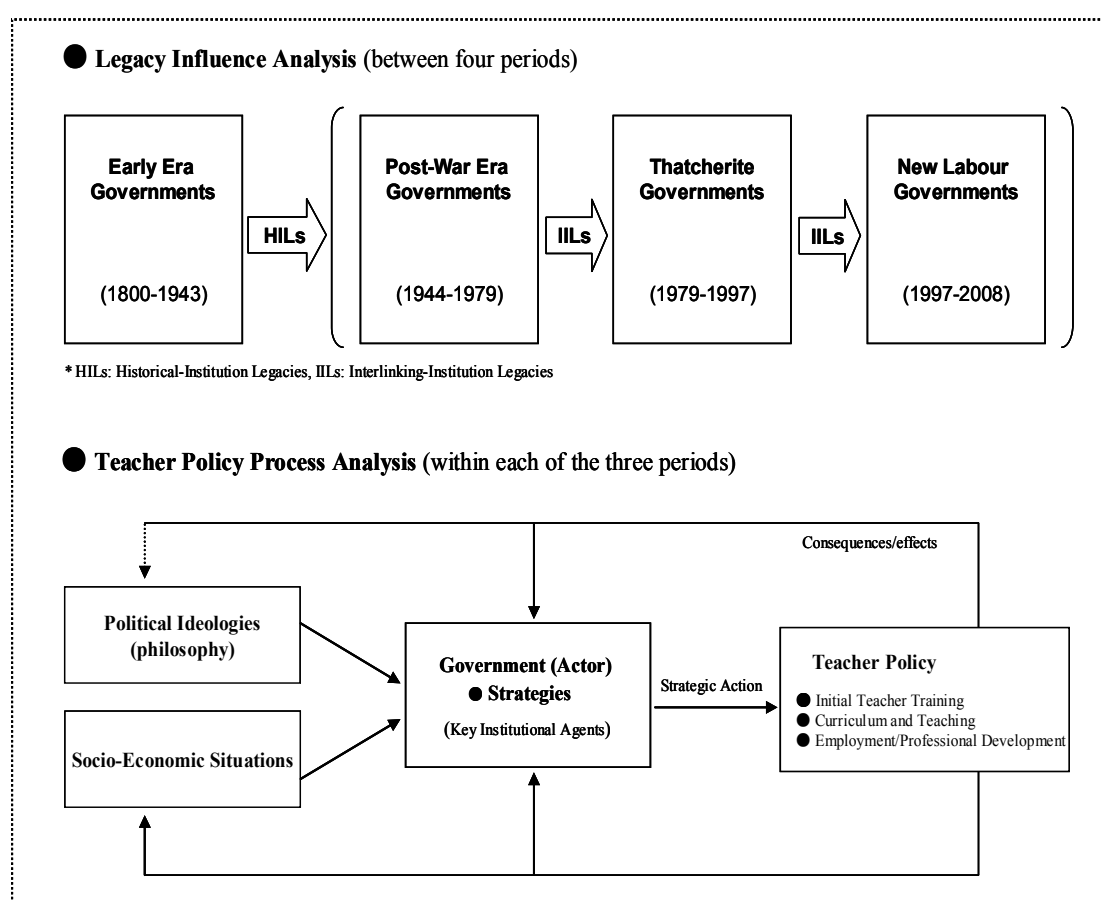
However, historical institutionalism has not been free from criticism. Rational choice theorists indicate that historical institutionalism is short of universally applicable concepts based on deductive theory. As Hall and Taylor (1996) point out, historical institutionalists are eclectic in their use of both a ‘calculus approach’ and a ‘cultural approach’ to the relationship between institutions and individual behaviour, rather than relying on a unified theoretical base. Peters et al. (2005) point out theoretical and analytical problems in historical institutionalism, including difficulty in explaining policy initiation and policy evolution along with unclear definitions.

1.5.2. Analytical framework for teacher policy

This study mainly employs the perspectives of historical institutionalism and the state-centred approach, and is based on historical institutionalism’s proposition that ‘history matters’; the two concepts of HILs and IILs are related to this proposition (see below). Furthermore, this study is state-oriented in that it sees central government as the main actor leading the whole teacher policymaking process as well as producing teacher policy documents. However, the state does not make policy in isolation from society.

With this recognition, this study also employs some other concepts which are partly related to the perspectives of the society-centred approach: political ideologies, including political philosophy, and socio-economic situations. The analytical framework proposed here is pictured in Figure 1.2. The first part of the Figure shows a process of legacy influence analysis, and the second part demonstrates the process of teacher policy analysis that will be applied to each of the three periods from the post-war era governments to the New Labour governments.

Figure 1.2 Analytical framework for the teacher policy process



1.5.2.1. Legacy influence analysis: HILs and IILs

This study employs the two institutional legacy concepts of HILs and IILs. These two terms are based on the perspectives of historical institutionalism. In particular, the key concept of path dependence in historical institutionalism is deeply related to HILs. Initially, the concept of path dependence was elaborated on by scholars in the field of economic history such as Paul David (1985, 1986), who studied the phenomenon of the collective take-up and persistence of the QWERTY keyboard despite the existence

of a technically superior alternative. Nowadays, path dependence has become a widely-used concept in social science (Wilsford, 1994; O'Brien, 1996; Berman, 1998; Sterman and Wittenberg, 1999; Arrow, 2000; Pierson, 2000; Mahoney, 2000 and 2001; Alexander, 2001; Garud and Karnoe, 2001; Scott, 2001; Greener, 2002 and 2005; Peters et al., 2005; Boas, 2007). In these studies, path dependence is related to the ways that scholars seeking to develop a general model of institutional development conceptualise and account for the challenging matters of both continuity and change over time. In this study, the HILs concept is developed in connection with the issue of institutional continuity, while the IILs concept is developed in relation to the issue of institutional change.

In explaining social causation, historical institutionalists are largely dependent on the notion of path dependence. Their central claim is that early choices formed at the time of institution formation or policy formulation had a persistent and constraining effect on subsequent choices (Koelble, 1995; Hall and Taylor, 1996; Peters, 2001). Sewell (1996: 262-63) suggests path dependence means 'that what has happened at an earlier point in time will affect the possible outcomes of a sequence of events occurring at a later point in time'. According to Levi (1997: 28), path dependence is the notion that 'the entrenchments of certain institutional arrangements obstruct an easy reversal of the initial choice'. In other words, historical institutionalists are deeply entrenched in the assumption that 'policymaking systems tend to be conservative and find ways of defending existing patterns of policy, as well as the organizations that make and deliver those policies' (Peters et al., 2005: 1276). Scholars describe in various terms the major feature of path dependence in respect of institutional continuity or stability: mechanisms of reproduction (Collier and Collier, 1991), lock-in (Wilsford, 1994), increasing returns (positive feedback) (Pierson, 2000), and self-reinforcing sequences and reactive sequences (Mahoney, 2000).

From the path-dependent perspective, history matters because institutions formed in the early stages constrain subsequent decisions in the policy process. As Greener (2002: 614) put it: 'once a given path has been laid, each subsequent decision is at least influenced by, and probably reinforces, what has gone before'. Policy legacies or institutional legacies are useful terms to describe this path-dependent situation in which a new government's choice of policies is constrained by existing institutions

institutionalised through previous policies during the past governments. In other words, they affect the nature and extent of current policymaking by the entrenched institutional routines and procedures within the system. In this study, the term ‘institution legacies’ is employed instead of ‘policy legacies’ since, from a historical institutionalist perspective, the concept of institutional legacies is broader than that of policy legacies, so that the former is useful for addressing legacy effects in various policy processes.

The concept of HILs is based on this path-dependent perspective emphasising institutional continuity. In this study, HILs are developed to address the long-lived effects of early institutions on subsequent policies over time. As seen in Figure 1.2, this study covers four periods; teacher policy in the first period of 1800-1943 will be addressed in terms of HILs. This study employs the concept of HILs with the postulation that the first period is a period in which some early institutions were shaped by the policies of the early era governments – a practice that continues to influence the current policy process. HILs are the effects of these early institutions, which were formulated in the first period, and have continued to exert some influence in the policy process of the three teacher policy areas until the latest fourth period.

One of the major challenges for historical institutionalists with the path-dependent perspective is to explain the institutional change which takes place in practice over time (Hira and Hira, 2000; Gorges, 2001). From an original historical institutionalist perspective, established institutions are fairly stable because of path dependence, so that institutional change or policy change is unlikely or, at best, incremental. To explain institutional change more persuasively, historical institutionalists use concepts such as critical junctures (Collier and Collier, 1991) and policy windows (Kingdon, 1995). In historical institutionalism, institutional change involves the dynamic of ‘punctuated equilibrium’ (Krasner, 1984), in which critical junctures or policy windows open up for the development of new institutions or policies in the process of responding to certain conditions such as domestic or international crises, which are soon followed by long periods of institutional stasis.

Recent studies on institutional development tend to focus on the ways in which institutions change rather than remain stable over time (Thelen, 2003, 2004; Crouch

and Farrell, 2004; Schwartz, 2004). In these studies, new notions are employed as fresh institutional change mechanisms: institutional layering, conversion, diffusion, drift and revision. Among them, particular attention has been paid to layering and conversion. According to Thelen's (2003: 225-226) explanations, institutional layering 'involves the partial renegotiation of some elements of a given set of institutions while leaving others in place', and institutional conversion refers to situations where 'existing institutions are redirected to new purposes, driving changes in the role they perform and/or the functions they serve'. Hacker (2004: 248) suggests four modes of policy change: drift, which means the transformation of stable policy due to changing circumstances; conversion, which means the internal adaptation of existing policy; layering, which involves the creation of new policy without elimination of the old; and revision, which means the formal reform, replacement or elimination of existing policy.

The concept of IILs is largely based on the above-mentioned notions including critical junctures, policy windows, layering, and conversion, which are employed to account for institutional change. In this study, IILs are developed to address the effects of institutional change taking place around the time of political change on subsequent governments' policies. As seen in Figure 1.2, IILs will be analysed in relation to the last three periods. This study employs the concept of IILs with the postulation that there exists a significant institutional change that took place in the previous government around the time of government change, which consequently had a substantial effect on the policy processes of subsequent governments. IILs are the effects of this institutional change on the teacher policies of subsequent governments. This study assumes that government change is a major political outcome, and any significant institutional change that affects the policies of subsequent governments starts to take place ahead of government change. This study therefore attempts to conceptualise the changing pattern of teacher policy during the period of government change by using the concept of IILs.

1.5.2.2. Teacher policy process analysis

As noted previously, this study aims to explain teacher policies during the first period of the early era governments from 1800 to 1943 in terms of HILs, and to explain teacher policies near the period of government change in terms of IILs. Additionally,

this study attempts to explain teacher policy during each of the three periods of post-war era governments, Thatcherite governments and New Labour governments, using the teacher policy process analysis model shown in the latter part of Figure 1.2. This model consists of the four main components: political ideologies, socio-economic situations, government strategies and key institutional agents, and teacher policy with three policy areas. The model suggests that teacher policy is a strategic action of the government, which leads the whole policymaking process as the main actor under/with the influence of political ideologies, but is faced with various challenges and demands from socio-economic situations. Further, it suggests that the consequences of teacher policy give policy feedback to government, socio-economic situations and, to a lesser extent, ideologies. In this part, I will discuss this model in detail, giving special attention to political ideologies, socio-economic situations and government strategies.

‘Ideology’ is a term whose conceptualisation and political significance have been highly contested since Destutt de Tracy coined it in 1796 to refer to one aspect of his ‘science of ideas’ (Kennedy, 1979: 354-55). It is defined in Britannica (2007) as both ‘a form of social or political philosophy in which practical elements are as prominent as theoretical ones’ and ‘a system of ideas that aspires both to explain the world and to change it’. According to Festenstein and Kenny (2005: 3-5), political ideologies have some structural or syntactic features: they provide an account of human society and history, an evaluative perspective on existing social and political phenomena and a sense of identity to individuals and groups while they are not exclusive but overlapping and interactive with each other. Throughout the nineteenth century, liberalism, socialism and conservatism served as major ideologies for understanding conflicting political commitments. Since the beginning of the twentieth century, these ideologies have been in the process of transformation, interacting with other ideologies.

In this study, the three periods of government to be considered are distinguished under the assumption that each has some distinctive political ideologies which are employed or supported by government, and are therefore influential in the policy process. Each British government since 1945 has been ruled by one or other of the two major parties, Conservative and Labour. Consequently, this study focuses on the political ideologies

employed or supported by the two parties and their prime ministerial leaders. This study postulates that political ideologies have a substantial influence on shaping government strategies in the policy process.

Another important concept in the model is socio-economic situations. In this study, it is assumed that socio-economic situations are major challenges and demands from both society and the economy which exert substantial influences and pressures on government in the teacher policy process. In a democratic capitalist society, groups or classes based on economic interest have increased their power in politics. This study focuses on socio-economic challenges and demands in certain situations including critical demographic change, economic recession or boom, and changing demands from businesses for the labour force. Furthermore, the concept of socio-economic situations comprises the influences of the socio-economic actors including businesses and teacher unions in the teacher policy process. This study postulates that socio-economic situations have a substantial influence on shaping government strategies in the policy process.

This study employs the perspective of the state-centred approach that the state is an autonomous entity, but uses the term ‘government’ instead of ‘state’ because it focuses on explaining teacher policy made by governments during different periods. From this perspective, it is postulated in this study that each of the three governmental groups employs certain strategies which are shaped under the influence of different political ideologies and socio-economic situations, and are embodied through its strategic actions of policy. As we see in Figure 1.2, this study sees teacher policy as a government’s strategic action for achieving its objectives, and further notes that government strategies are a core concept in analysing and explaining a wide range of the teacher policies addressed in Chapters 3-5. These strategies, together with political ideologies and socio-economic situations, will be discussed in Chapter 2 in advance, and then teacher policy in the three teacher policy areas will be analysed in the subsequent chapters, mainly in terms of these government strategies.

Government does not make policies by itself. In government, there are key institutional agents who shape government’s objectives and strategies and make policies to achieve those objectives. This study assumes that key institutional agents

consist of political actors and core organisations: political actors are people who lead a political process of teacher policy, that is, politicians such as prime ministers, ministers and MPs, and core organisations are practical organisations such as departments of government and quangos which support political actors and produce most of the policy documents in the policy process. The concept of key institutional agents is mainly based on the perspective of historical institutionalism in that political actors and core organisations are seen as being institutional because their power and role in the policy process are ultimately on the basis of formal and informal institutions such as legislation and conventions.

1.6. Organisation of the Thesis

This thesis consists of six chapters. After this first chapter, the second will describe the government's major strategies during each of the three periods in terms of the concepts of political ideologies and socio-economic situations. This second chapter will also play a key role as a backdrop in explaining a number of teacher policies addressed in the third, fourth, and fifth chapters. The third chapter will address policies on initial teacher training; teacher policy in this area will be explained in terms of three policy themes: initial teacher training (ITT) institutions, ITT courses and the accreditation regime. The fourth chapter will address policies on curriculum and teaching; teacher policy in this area will be explained in terms of five policy themes: curriculum control and change, the school system, examinations and the assessment system, teaching methods, and professional autonomy. The fifth chapter will address policies on teacher employment and professional development; teacher policy in this area will be explained in terms of five policy themes: teacher qualification, teacher employment, teacher salary and working conditions, teacher appraisal, and in-service training and CPD. The final chapter, Chapter 6, will provide a summary of the research findings and some implications.

Chapter 2: Government Strategies under Political Ideologies and Socio-Economic Situations

The previous chapter addressed the analytical framework in which the government is the main actor in the teacher policy process, having its own strategies. This chapter deals with the strategies of the three identified eras of government shaped under certain political ideologies and socio-economic situations. As noted, teacher policy in the early era governments is to be analysed in terms of HILs so that the first section of this chapter for the early era governments addresses, instead of government strategies, major political and socio-economic situations in this period under which HILs develop.

2.1. Early Era Governments

2.1.1. Britain in the Industrial Revolution

From the late seventeenth century to the mid-nineteenth century, politics in Britain was dominated by two parties: the Whigs and Tories. In the modern sense, however, they both can be seen just as loose alliances of interests and individuals rather than political parties. The Whigs were associated with the newly emerging wealthy industrial classes, while the Tories were associated with the landed gentry, the Church of England and the Church of Scotland. In addition, the right to vote was given to just a few men of property in each constituency, and so parliamentary seats could be obtained by bribing a few electors and were retained largely by the landed aristocracy and large landowners. By the mid-nineteenth century, the two parties of the Whigs and the Tories had evolved into the Liberal Party and the Conservative Party, respectively.

In the late eighteenth century, the American War of Independence and the French Revolution had a sizable impact on British politics. However, it was the so-called ‘industrial revolution’ that had the most profound impact on the British society and

economy. Although the period of time covered by the industrial revolution varies according to the viewpoints of different scholars, there were radical changes in British socio-economic geography from the second half of the eighteenth century to the mid-nineteenth century, particularly between the 1760s and 1830s. Hartwell (1967: 10) suggests forces such as capital accumulation, growing world trade, technological innovations, and the growth of laissez-faire as the main causes of the industrial revolution.

In particular, the growing use of mill machinery run by water and steam power to spin and weave cloth and shape metal stimulated the creation of the modern factories. As water power was replaced by steam power, factories with many workers gathered together near places of industrial convenience such as coalfields, which eventually led to the birth of many industrial towns and cities. English urbanisation, measured by the percentage of total population in towns of 10,000 or more people in the period of the industrial revolution, was more rapid than anywhere else in Europe (see Appendix 2.1). Alongside this rapid urbanisation was a rapid increase in the population, largely due to immigration. During the nineteenth century, the population grew unprecedentedly from nine to thirty-three million for England and Wales (Evans, 1975: 1).

The industrial revolution had some notable effects on British politics and education. First of all, new middle classes such as industrialists, professionals and merchants and, eventually, the organised working class emerged as new political forces. During the course of the industrial revolution the status of landed aristocrats and gentry, who had previously dominated Parliament, began to destabilise. This situation is well reflected in the passing of the Reform Act 1832, which represents the starting point for modern elected government through extending the franchise to all the wealthy and the upper middle class.

Secondly, education at elementary level for the children of the poor started on a large scale through schools such as charity schools and Sunday schools (see section 4.1) run on a voluntary basis. The need to educate poor children increased as British society became industrialised and urbanised. At the beginning of the nineteenth century, two religious societies came into existence to meet this growing educational need: the

National Society for Promoting the Education of the Poor in the Principles of the Established Church (1811) and the Society for Promoting the Lancasterian System for the Education of the Poor (1808), which was renamed in 1814 as the British and Foreign Schools Society. The so-called monitorial system was used as an early form of teacher training in voluntary day schools, established and administered by religious societies including the two leading societies (see section 3.1).

Lastly, the state started to intervene in education, with Parliament voting the first state grant of £20,000 for the construction of schools for poor children in 1833 (see section 4.1.2). The Whig government of Earl Grey was further involved in the area of social policy with the passing of the Poor Law Amendment Act 1834 to address the poor cheaply and efficiently through imposing compulsory entrance to workhouses on those who needed relief. Nevertheless, English popular education at elementary level at this time was largely in the charge of various denominations, particularly the Church of England.

2.1.2. The Victorian age and classical liberalism

During the Victorian period, Britain dominated the world as its greatest power. By industrialising earlier than other European countries, Britain came to achieve economic dominance in the world economy in the second half of the nineteenth century. By 1880, Britain accounted for 22.9 per cent of world manufacturing output, up from just 1.9 per cent in 1750, and produced 53 per cent of the world's iron and 50 per cent of its coal in 1860 (Axford, 2004: 35). This British economic dominance was underpinned by myriad factors such as invincible naval power, expanded colonies, and financial power with access to vast investment capital.

In addition, Britain's dominance in the world economy during the Victorian age was supported by the ideology of classical liberalism. Although it is difficult to precisely date its origins or demarcate its boundaries, liberalism was generated in the seventeenth century, coinciding with the dissolution of feudal relations and the emergence of modern capitalist society (Eccleshall, 2003: 18). Liberalism has many different forms, but its core emphasis is on two notions: individual rights by strictly

limiting the powers of government, and equality of opportunity. In particular, classical or economic liberalism was based on the ideas of classical economists such as Adam Smith, David Ricardo and Jeremy Bentham, who gave strong support to the laissez-faire idea of free trade and free markets with the argument that trade and well-being would be maximised in a market where independent producers could trade freely with each other without state intervention.

The rise of laissez-faire liberalism meant a substantial turn from the mercantilist view prevalent in the eighteenth century. The Corn Laws, introduced in 1815 as import tariffs to support domestic corn prices, were repealed in 1846. This marked not only a symbolic step towards free trade, but also the growing influence of the new middle class on British politics. As Laski (1936: 17) points out, liberalism was ‘the idea by which the new middle class rose to a position of political dominance’. During the second half of the nineteenth century, British Parliament was dominated by two major political parties – the Liberal Party of reformers and the Conservative Party of defenders of established interests, with a series of reforms reflecting the values of the Victorian middle classes: the right to vote was further extended through the Second Reform Act 1867 and the Third Reform Act 1884; the armed forces and civil service began to recruit on the basis of open competition and merit rather than the ability to buy a position; and public schools, institutes and, later, universities were created.

With the emergence of the new middle classes in the industrial revolution, Britain became a more class-divided society, and the configuration of class divisions fixed at this time remained almost unchanged until the 1940s. The development of a dual system of education in the nineteenth century reflects this situation. The children of upper and middle class Anglican families received an education provided by grammar schools focusing on Greek and Latin texts to make them ‘gentlemen’ or ‘white collar’ workers, while most children from the working class, comprising the great majority of the population, received just a cheap elementary education.

However, it was also during the Victorian age that the state system of elementary education in England and Wales began to take form through a series of policies. In 1839, under the Whig government of Viscount Melbourne, the growing need to supervise government grants given to voluntary bodies for education since 1833 led to

the establishment of the Committee of the Privy Council on Education (CPCE), and Dr James Kay, later known as Sir James Kay-Shuttleworth (1804-1877), was appointed as its Secretary. He pioneered the foundation of teacher training colleges and the introduction of the pupil-teacher system (see section 3.1), and the committee became an early form of an education department² in England. In the same year of 1839, the growing need to inspect schools administered by those voluntary bodies led to the establishment of Her Majesty's Inspectorate (HMI), and government grants became conditional on a satisfactory inspection.

As noted, the government started its intervention in education by providing Parliamentary grants. As the amount of grants rapidly grew, it began to control the curriculum and examinations through the Revised Code of 1862 (see section 4.1.2). Before 1870, however, education was largely in the private sector, with the local provision of schooling continuing to rest with voluntary bodies. It was the Elementary Education Act 1870 that eventually brought elementary education into the public sector. This Act required state-funded board schools managed by elected school boards to be established to provide elementary education in areas where voluntary schools were insufficient, or where the ratepayers demanded it. Through the Act, elementary education in England began to develop on the basis of a dual system: voluntary schools versus board schools.

Following the 1870 Act, a series of Acts towards a modern state system of elementary education was legislated: the Elementary Education Act 1876 placed a duty on parents to ensure that their children received elementary instruction in reading, writing and arithmetic; the Elementary Education Act 1880 made education compulsory from the ages of 5 to 10; the Free Elementary Education Act³ 1891 provided for the state payment of school fees up to ten shillings per week; the Elementary Education (School Attendance) Act 1893 raised the school leaving age to 11 and later up to 12 in

² The name of the education department in England has continuously changed as follows: The Committee of the Privy Council on Education (CPCE, 1839-1899), Education Department (ED, 1856-1899), Board of Education (BoE, 1899-1944), Ministry of Education (MoE, 1944-1964), Department of Education and Science (DES, 1964-1992), Department for Education (DfE, 1992-1995), Department for Education and Employment (DfEE, 1995-2001), Department for Education and Skills (DfES, 2001-2007) and Department for Children, Schools and Families (DCSF, 2007 to the present day).

³ With the Act, the majority of elementary schools became free, but it was not until 1918 that all school fees were finally abolished (MoE, 1951: 33).

1899; the Elementary Education (Blind and Deaf Children) Act 1893 made provision for the creation of special schools; the Voluntary Schools Act 1897 provided grants to public elementary schools such as church schools, which were not funded by school boards.

2.1.3. Growing state intervention and the Great Depression

The free trade-based British economy suffered from growing foreign competition from the 1880s onwards. In 1880, Britain accounted for 23.2 per cent of world trade, but by 1914 this proportion fell to 14.1 per cent (Axford, 2004: 36). On their way towards industrialisation, continental countries and the United States, which industrialised later than Britain, adopted economic policies based on the idea of national protectionism, which was quite different from Britain's internationally-focused free trade. Under national protectionism, they imposed taxes on imported goods in order to protect their home industry from cheaper British products. As these countries developed their own industries, Britain's economic advantage began to lessen. Along with this growing economic competition, in this period there was also increasing military competition between the great powers as they established control over almost all of Asia and Africa. This increasing economic and military competition eventually led to the First World War in 1914.

Although Britain won the war with the assistance of its chief allies of the USA and France, this was achieved at enormous financial, as well as human and military, cost during the war period. Britain financed the war through deficit budgets, which created a massive national debt (see Appendix 2.2). These costs helped to weaken international confidence in sterling, and Britain had to suspend the so-called gold standard in 1919. The gold standard was re-established in 1925 by the then Chancellor of the Exchequer Winston Churchill, and was eventually abandoned in 1931. The war disrupted the old world order. Imperial Germany was replaced by a smaller democratic republic and imperial Russia was also replaced by the communist Soviet Union. The United States grew into the greatest economic power, but withdrew into isolationism, refusing to join the newly established League of Nations. More

importantly, Britain lost its world-dictating status with the end of its naval hegemony and became just one of the European powers.

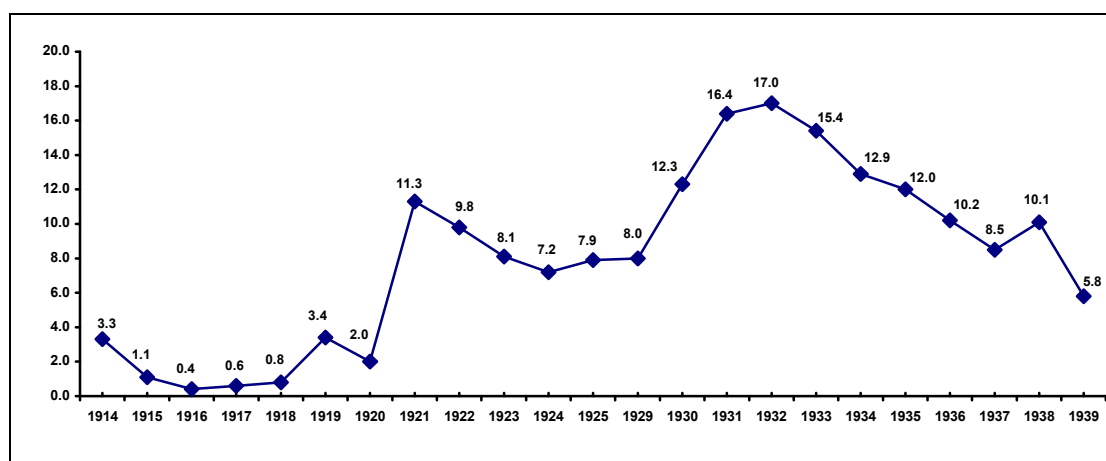
The growth of trade unions from the second half of the nineteenth century is important in the history of British politics. Following the formation of the Trades Union Congress (TUC) in 1868, trade unions were legalised by the Liberal government's Trade Union Act 1871, and were further facilitated by the Conservative government's Conspiracy Act 1875. On this foundation, trade unions gradually grew large enough to send 'Labour' candidates to Parliament, which contributed to the foundation of the fully fledged Labour Party in 1900 (Budge et al., 2004: 48). The Liberal governments during the period of 1905-1915 strengthened the legal basis of trade unions through legislation such as the Trades Disputes Act 1906 and the Trade Union Act 1913, allowing trade unions to use funds for political purposes.

With the growth of trade unions and the rise of the Labour Party, the Liberal Party became more dependent on working class votes and Labour Party support in Parliament. The National Insurance Act 1911, which is regarded as one of the foundations of British modern social welfare through its provision of health and unemployment insurance, was passed with Labour support. In the meantime, socialism, which had developed as a critique and alternative to capitalism, was seized on by union activists (Lovell, 1977) and became an ideological pillar of the Labour Party. After the war, the year of 1924 eventually saw the Labour Party emerge as a ruling party. Since then, both the Labour Party and the Conservative Party have dominated British politics.

The long-time maintenance of the strong pound through the gold standard reduced British industrial competitiveness. As Figure 2.1 below shows, the unemployment rate reached a peak of 11.3 per cent in 1921. In this situation, the argument of imposing tariffs and quotas on imports to protect British industry was given more support. The Great Depression put Britain in a more severe situation of unemployment in the early 1930s: the unemployment rate reached a peak of 17.0 per cent in 1932 and more than 3 million people were unemployed between 1931 and 1933. Eventually, the idea of free trade based on laissez-faire liberalism was abandoned, and protectionist measures including protective tariffs were introduced under the Conservative-dominated

national governments in the 1930s to regulate the market. Furthermore, and pertinent to this study, the economic recession in this period led to two cuts in teachers' salaries (see section 5.1.2).

Figure 2-1 Unemployment, 1914-1939 (%)



Source: Tomlinson (1990: 46, 99). 1926-28 (not available)

Active intervention of the state in society and the economy during and after the period of the Great Depression was encouraged by the theory of Keynesian economics, with an emphasis on government's demand management through its expenditure. Under this theory, government's expenditure on armaments was massively increased in the late 1930s and unemployment fell to a low level during the Second World War period, to the extent that only 60,000 people were registered as unemployed by June 1943 (Budge et al., 2004: 59). On the other hand, new industries grew in the Midlands and the south of England under government protectionist policies since the 1930s as opposed to the declining old industries in the industrial north. In 1942, the Beveridge Report laid the foundations for the post-war welfare state by recommending comprehensive welfare services and income support.

During the early twentieth century, the whole state system of education at both elementary and secondary levels took form along with two significant Acts: the Education Act 1902 and the Education Act 1918. The 1902 Act, legislated under the Conservative government, brought significant changes to the educational system: the existing school boards set up by the 1870 Act were replaced by new LEAs given

powers to establish new secondary and technical schools as well as develop the existing system of elementary schools; all schools including voluntary schools, despite non-conformist opposition, were funded through local rates so that denominational schools came under some control of the government. The 1902 Act also led to the emergence of LEA-maintained training colleges (see section 3.1.2). The 1918 Act made secondary education compulsory up to the age of 14, giving responsibility for secondary schools to the state. Under the Act, many higher elementary schools and endowed grammar schools could choose to become state-funded central schools or secondary schools.

2.2. Post-War Era Governments

2.2.1. Political ideology: the post-war consensus

The dominance of the Conservative Party and the Labour Party as the two major parties in British politics became more solid during the post-war period of 1945-79 (see Appendix 2.3). In the general election of July 1945, the Labour Party, for the first time in the twentieth century, won a truly sweeping victory over the Conservative Party after two brief periods of 1924 and 1929-1931 in minority governments. In the 1950 election, Labour won a narrow majority. However, ill-health and internal dissension in the Labour Party prevented the government from maintaining this narrow majority, and eventually brought an early election in October 1951 (Hill, 1993: 25). In this election the Conservatives won a narrow majority, and strengthened their hold on power by winning the subsequent elections of 1955 and 1959, ruling over 13 years.

After enduring the ‘wilderness years’ of 1951-1964, the Labour Party won the 1964 general election with a majority of just four seats. The Wilson government managed to return with a much larger majority in a second election in March 1966. In May 1970, Wilson called a general election with the view of recovering his government’s popularity, but in spite of being well ahead in the opinion polls, Labour was defeated by the Conservatives, led by Edward Heath since 1965, with a majority of 15. In February 1974, Heath called an election with a view to bolstering his government. In this election, the Conservatives received the highest proportion of the votes, but the Labour Party gained a majority of seats thanks to the Ulster Unionist MPs refusing to support the Conservatives. Harold Wilson again became Prime Minister with a minority, and gained a narrow majority in a second election in October 1974.

The Conservative Party is literally a party to conserve something, and traditionally the Establishment, the Union and the Empire have been the three main pillars for the Party to conserve (Charmley, 1996: 5). With franchise extension since the late nineteenth century, new principles were added to this Conservative tradition,

particularly by two notable statesmen, Disraeli and Salisbury. Further, it is widely accepted that Conservative politics since the Second World War has been cyclically dominated by two groups: 'wets', who are more collectivist as followers of a Disraelian 'one nation' Toryism and believe in a bigger role for government including planning and intervention; and 'drys', who are more liberal as followers of Salisbury's politics for defending the free market and believe in less government intervention and sound financial policy (Kavanagh, 1990; Willetts, 1992). During the Conservative rule of 1951-64, dry dominance continued until 1958 when Conservative policy became wet (Willetts, 1992: 39).

In the Labour Party, there were more diverse ideological positions during the post-war era. Drucker (1979: 44-45) suggests four ideological strands distinctive in Labour Party politics during this period: socialism, the furthest-left position, which emphasises nationalisation by wholesale takeovers of privately owned industries; consolidationism, which focuses on the protection and efficient operation of existing publicly-owned industries rather than further takeovers; revisionism, known also as social democracy and democratic socialism, which emphasises the extension of social services to ameliorate inequalities through increasing public expenditure; and corporate socialism, which emphasises the social contract, particularly between the TUC and government. In Labour politics, socialism was a common view until 1951, and corporate socialism only relatively recently taken up from 1974 by the Wilson-Callaghan governments.

Despite these diverse ideological positions within and between the two major parties, it is also widely accepted that there was a consensus between the two parties on important areas of policy for much of the post-war period. According to Seldon (1994: 501), the thesis of the post-war consensus became popularised with the publication *The Road To 1945*. In the introduction to this book, Addison (1975) argues that the experience of coalition between the three main parties during the Second World War – and a wide range of reforms pictured and endorsed by this coalition government – gave rise to a new political consensus which dominated British politics long after the end of the war. It was during the Attlee government of 1945-51 that the post-war consensus was firmly laid down. As Tomlinson (2003: 193) points out, the Labour Party sees social justice and economic efficiency as its core

objectives for existence. Therefore, both social justice and economic efficiency, often referred to just as social equality, were also the main objectives of the Labour Party during the post-war era.

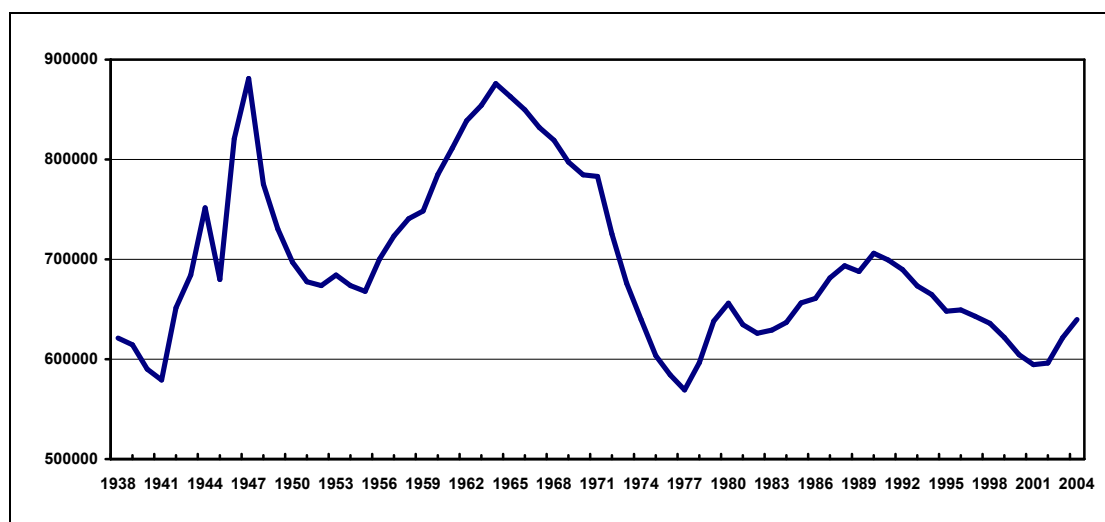
The post-war consensus, often referred to as the ‘social democratic consensus’, was broadly accepted among post-war parties and consisted of the welfare state with a commitment to a gentle expansion of social services in line with national prosperity growth; the mixed economy with a mix of public and private ownership; Keynesian economic policies aiming at full employment by balancing inflation against unemployment; the powers and roles of the trade unions as the main pressure groups; and a managed withdrawal from colonies and overseas territories, together with Britain’s role as a nuclear power and membership of the Atlantic Alliance (Kavanagh and Morris, 1994: 4; Budge et al., 2004: 404). Although there is some scepticism surrounding the very existence of the post-war consensus (Pimlott, 1988), the objectives and strategies of the post-war governments before Thatcher came into power in 1979 remained almost unchanged within the framework of the fundamental reforms pictured by the coalition government and institutionalised by the Attlee Labour government under the post-war consensus. With severe economic contraction in the 1970s, the post-war consensus began to collapse under the Wilson-Callaghan governments (Marquand, 1988: 3).

2.2.2. Socio-economic situations

Time serial changes in birth rate are significant in the teacher policy process in the sense that they can influence the whole scale of the future school population, ITT and the teaching profession. As Figure 2.2 shows, during 1944-1972, except for 1945 and 1950-55, annual numbers of live births in England and Wales maintained a high level of above 700,000. This post-war bulge contributed to continual expansion in education until the early 1970s, acting as a key factor for the consistent increase in the number of pupils and teachers during the post-war period (see sections 4.2.2; 5.2.1). The rapid change in birth rate between 1955 and 1977 is also worth noting. The number of births increased annually from 667,811 in 1955 to 875,972 in 1964, and thereafter it consistently decreased to 569,259 in 1977. This radical fall led to a

reduction in the number of admissions to ITT, and facilitated the educational reorganisation process between 1974 and 1982 (see section 3.3.1).

Figure 2.2. Live births in England and Wales, 1938-2004



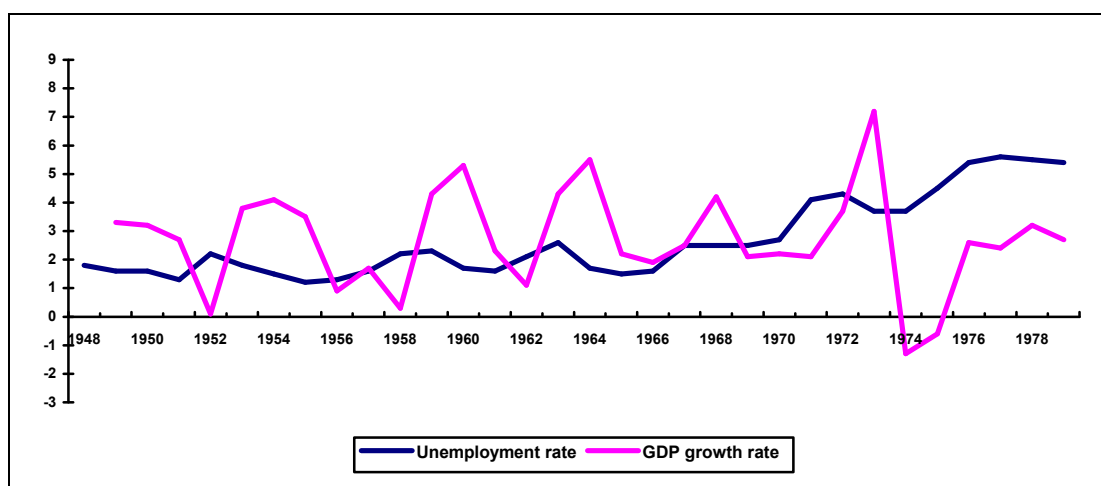
Source: ONS (2008a)

This post-war baby boom and educational expansion came with economic growth at this time. After the hard times of the 1940s which saw post-war reconstruction from the ravages of the war, the British economy experienced growing economic affluence. As Figure 2.3 below shows, throughout the 1950s and 1960s unemployment remained low. In the 1950s, the real incomes of workers rose by 50 per cent (Dearlove and Saunders, 2000: 505). Sustaining economic growth and low employment attracted a number of immigrants looking for jobs, from Ireland, the colonies and ex-colonies (Budge et al., 2004: 10). Although there were restrictions on immigration from 1962 onwards, the influx of the immigrants consequently made British society more multicultural. With the expansion of the traditional industries and the development of new service sectors such as tourism and personal finance, the British economy came to experience two decades of post-war growth and prosperity, unparalleled at this time throughout the western capitalist world.

Conversely, the past decades since this time and up to the present day have seen a number of discourses which see the other side of the British economy, that is 'relative decline' and a 'stop-go' phenomenon in the economy (Coates, 1994). Growth rates of real GDP per head have been relatively lower than France, Germany, Japan and USA

for most of periods since 1870 (Maddison, 1991: 49). By 1961, Britain had been overtaken by its competitors, France and Germany, in income per head for the first time since the industrial revolution (Cairncross, 1996: 6). In a Keynesian demand management framework, during much of the post-war period, there were periodic ‘stop-go’ cycles in the British economy. The periodically fluctuating change in GDP in Figure 2.3 reflects this stop-go phenomenon.

Figure 2.3 Annual change in unemployment and GDP in the UK, 1948-1979

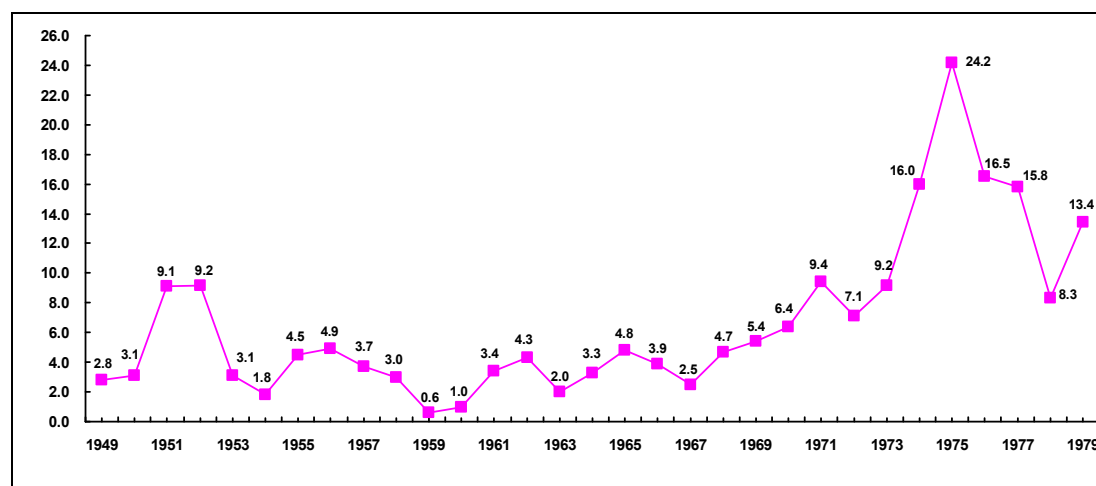


Source: Middleton (2000: 149), ONS (2009a; 2009b)

With the advent of the 1973 oil crisis, Britain experienced severe economic recession. As Figure 2.3 shows, there was a growing increase in unemployment during the first two years in Heath’s office, reaching its peak at 4.3 per cent (around 1,116,000) in 1972. There was more severe economic contraction in 1974, with the GDP growth rate falling to -1.3 per cent. As Figure 2.4 shows, from 1973 the British economy experienced severe inflation, reaching its peak at 24.2 per cent in RPI. Moreover, there was a large balance of payments deficit between 1973 and 1975. These situations led to the pound plummeting in international currency markets, and eventually the Labour government was forced to call for £2,300 million from the IMF in September 1976 (Foote, 1988: 197). The IMF demand for tight monetary controls brought substantial cuts in public spending and a massive reduction in the level of demand in the economy, together with wage control and high unemployment. People also had to experience the three-day week and the cutting off of power supplies for substantial periods during this economic crisis. The winter of 1978/79 was the

toughest for the Labour government; it had to undergo the ‘winter of discontent’ with severe industrial disputes and high unemployment.

Figure 2.4 Annual change in Retail Price Index (RPI), 1949-1979



Source: ONS (2009c)

2.2.3. Government strategies

2.2.3.1. Post-war partnership strategy

Under the post-war consensus and changing socio-economic situations, post-war governments were greatly dependent on a post-war partnership in the policy process. This post-war partnership was officially instituted by the Education Act 1944. The 1944 Act was a comprehensive product of the wartime coalition between the Conservative and Labour parties, and this helped the Act to function as the bedrock of social democratic consensus in the operation of the educational system during the post-war era. In the Act, the aspect of post-war consensus was reflected in the form of partnership among educational stakeholders. As Richard Pring (1995: 25) puts it, the 1944 Act ‘supported a partnership between central government, local education authorities (LEAs), teachers and the churches’.

Under the post-war partnership strategy, central government allowed LEAs, teachers’ unions and the churches to participate in the teacher policy process as its central partners, and preferred to minimise its role in this process. Within the framework of the 1944 Act, responsibility for the provision of education was largely delegated to

LEAs; so they played an active role in the policy process during the post-war period. Moreover, the churches were able to maintain a certain control over their schools, making religious instruction and daily collective worship statutory obligations in both voluntary and county schools. In particular, teachers and their unions participated actively in the policy process. As noted, one of the components of the post-war consensus is that the post-war parties acknowledged the powers and roles of the trade unions as the main pressure groups. Under the post-war partnership strategy, the government treated teachers and their unions as its core partner in the teacher policy process, granting them substantial professional autonomy. Teachers and their unions, therefore, played an active role in the policy process, particularly through the participation of their representatives in most governmental committees or organisations.

2.2.3.2. Keynesian intervention strategy

Another strategy employed by the post-war governments can be termed the 'Keynesian intervention strategy', based on the post-war consensus. The post-war era governments intervened actively in the planning of the economy and education under the post-war consensus that contained components of the welfare state, the mixed economy and Keynesian economics. In particular, Keynesian economics, which backs a government's active intervention in the economy through demand management, began to gain its position as a macroeconomic orthodoxy over three decades after the Second World War (Crafts and Woodward, 1991: 64-65). When the Attlee government came into power in 1945, it chose economic planning and public ownership as the main economic policy instruments for post-war reconstruction. Most nationalised industries during the Attlee government remained unchanged in the Conservative governments of 1951-64. In 1972, the Heath Conservative government extended public ownership to Rolls-Royce and Upper Clyde Shipyard to save jobs. The foundations of the post-war welfare state were helped greatly by the Beveridge Report (1942), and the main recommendations in the report were embodied by the Attlee government through a series of welfare statutes. By the mid-1970s, there was a consistent increase both in public expenditure and spending on welfare, regardless of the kinds of governments in power (Kavanagh and Morris, 1994: 79).

Under the Keynesian intervention strategy, from the early 1960s onwards, both Conservative and Labour politicians became increasingly involved in more concerted economic planning. In 1962, the Conservative government established the National Economic Development Council (NEDC), the first institution for economic planning in Britain. In 1964, the Wilson government took a further step by establishing a new Department of Economic Affairs (DEA), retaining the NEDC in part. Following discussions with employers and trade unions, a National Board for Prices and Incomes (NBPI) was established in 1965 to scrutinise all wage and price increases (DEA, 1965a; 1965b). Finally, the government published Britain's first 'national plan' designed to achieve 'a 25 per cent increase in national output between 1964 and 1970' (DEA, 1965c: 1). However, due to the balance of payments deficit, the government soon forsook its national plan and growth targets and became more dependent on wage-price controls, which made trade unions restive and reduced flexibility in the teachers' salary negotiating process under the Burnham system (see section 5.2.2).

The Heath government disbanded the institutions for state planning. However, faced with rapidly rising unemployment and escalating industrial unrest during its two years of office, the government threw away its commitment to a free market and returned to large scale intervention in wages and prices, establishing two bodies – the Pay Board (PB) and the Price Commission (PC). After having resolved the miners' strikes, together with the 'social contract' under corporate socialism, the Wilson government started to intervene directly in the investment policy of key companies and specific industries through the Industry Act 1975. The National Enterprise Board (NEB) was established by the Act in order to provide investment funds to viable firms through buying shares or granting low-cost loans.

2.3. Thatcherite Governments of 1979-1997

2.3.1. Political ideology: Thatcherism and the New Right

After the winter of discontent of 1978/79, there was a general election in May 1979. The Conservatives, led by Margaret Thatcher from 1975, won the election with an overall majority of 43 (Foote, 1988: 214). Through this election, Thatcher became the first female Prime Minister in British politics. She held the office until 1990, winning the subsequent general elections of 1983 and 1987. The 1980s, in her long tenure, witnessed radical changes in many spheres, with the term 'Thatcherism' flourishing to describe her policies. The policies pursued by Thatcher during her term in office included a free market economy with decreased state intervention, monetarist economic policy, lower direct taxation and higher indirect taxation, the privatisation of state-owned industries, opposition to trade unions, and a reduction in the size of the welfare state (Jessop et al., 1988; Evans, 1997a).

Thatcher won the 1987 election with a 101-seat majority. Her third government replaced the local government rates with the community charge (poll tax) in Scotland in 1989 and in England and Wales in 1990, which had already been presented in the party's 1987 manifesto. Nevertheless, what the government had to confront was a massive refusal to pay. This unpopular tax policy, along with perceived mishandling of the economy with high interest rates, contributed to the erosion of her support. Thatcher's leadership was challenged by an internal ballot, in spite of the fact that she had led the victory of the 1987 election. In this situation, she surprisingly resigned from office on 22 November 1990, announcing that she would not be a candidate in the second ballot.

On 27 November 1990, John Major was elected as the new Prime Minister through the second ballot, shortly after Thatcher's resignation. In contrast to Thatcher's personality, Major's was considered emollient and genial. In his early premiership, he was committed to the notion of 'one nation', with the acknowledgement that Thatcherism had widened discord and division in British society (Dorey, 1999). The

period of his premiership was also a time of transformation. The world economy began to recess after the long 1980s boom. Globalisation also strengthened throughout the 1990s, and a new east-west détente culminated in 1991 with the collapse of Soviet power. In April 1992, Major's Conservatives managed to win the general election with a small majority of 21 seats, which also contributed to bringing about continuous challenges to Major's leadership. This culminated in 1995 when Major resigned as leader of the Conservatives. Although party infighting and scandals eroded his parliamentary and public support, Major was reaffirmed as Conservative party leader in 1995. However, he failed to restore the popularity of his party. In the 1997 election, Major had to witness the immense scale of the defeat by Tony Blair's New Labour.

It is widely accepted among scholars that 'the impact of the Thatcher-led Conservative governments altered the form of British politics' (Heffernan, 2000: 31). Accordingly, Thatcherism has been a popular theme of study in British politics, and many scholars regard it as a combination of different ideological elements. Hall (1983: 29) sees Thatcherism as populism, which combines themes of traditional Toryism such as nation, family, duty, authority, standards and traditionalism with themes of a revived neo-liberalism such as self-interest, competitive individualism and anti-statism. Similar views on Thatcherism are found in the literature: a mix of authoritarianism representing a strong state and economic liberalism representing a free market (Gamble, 1983); authoritarian populism with a combination of authoritarianism and populism (Jessop et al., 1988); and principles of free markets aligned with a strong sense of community (Willetts, 1992). Additionally, Thatcherism can be interpreted in other respects such as personal attributes, political personality and leadership style, and a distinctive set of policies or political discourse (Jessop et al., 1988: 6-8).

Due to the mix of different ideological elements mentioned above, it is often pointed out that there are discrepancies in Thatcherism between economic liberalism and authoritarianism, nationalism and anti-statism, and political rhetoric and policy outcomes. However, given the fact that Thatcherism is largely based on New Right thinking, these discrepancies are not so unusual. When Thatcher came into office in 1979, Conservative governments became concerned with undermining the social democratic consensus and restructuring the welfare state through a series of policies

which were supported by so-called New Right ideologies. The New Right position included two major strands of thought in line with the traditional ideological strands of 'drys' and 'wets' in the Conservative Party: the 'neo-liberal market advocates' and the 'neo-conservative defenders of traditional forms of authority and national culture' (Barton et al., 1994: 532). Some differences exist between the two strands, but both are 'critical of egalitarianism and collectivism which they allege have encouraged an anti-enterprise and permissive culture' (Barton et al., 1994: 532).

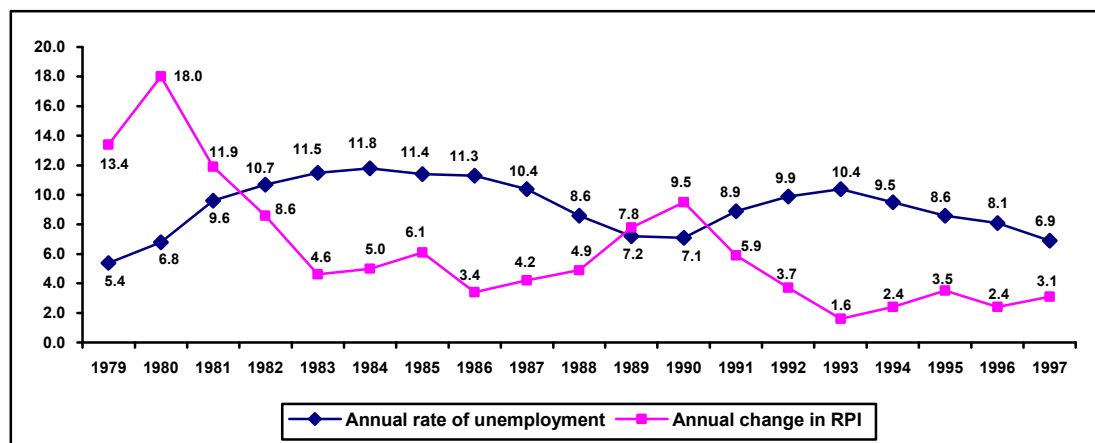
Therefore, it is understandable that the Thatcherite governments pursued a strong state and free market under the influence of these New Right ideologies. In other words, the New Right was 'a broad coalition of neo-liberals, interested chiefly in competition, free markets and tight control of public spending, and neo-conservatives, interested primarily in upholding nineteenth-century notions of tradition, hierarchy and social order' (Chitty, 2004: 47). Under the New Right ideologies, freedom and economic prosperity became the main objectives of the Thatcherite governments, rejecting the notion of equality (social justice), which had been one of the dual objectives of the post-war era governments, with economic efficiency (prosperity).

Relating to educational policy, Maclure (1998: 5) presents four powerful ideas which dominated the thinking of the New Right reformers: distrust of local democracy and the institutions of local government; distrust of the educational establishment – the teachers' unions, the local education authority leaders and professional staff, the university authorities, and the teacher trainers; distrust of professional autonomy and the ideals of public service; and a belief in market mechanisms as applied to public sector activities such as education and health. It should be also noted that the politics of Thatcherism was not unique in the international context. In New Right perspectives, Thatcherite reforms were more or less in line with those of the Reagan administration in the US, the French governments of Mitterrand and Chirac, and the Hawke government in Australia. For example, the policies based on the notions of privatisation, deregulation and neo-classical economics were prevalent throughout these countries.

2.3.2. Socio-economic situations

During the Thatcherite governments, the British economy underwent contrasting changes in inflation and unemployment. As Figure 2.5 shows, there was a striking trade-off between the annual change in RPI and unemployment throughout the period of 1979-1997. In particular, it should be noted that the British economy experienced a high level of unemployment under the Thatcherite governments; the average rate of unemployment during this period is much higher than that during the post-war era governments. The new national qualification framework and ‘new vocationalism’ emerged as an education and training response to this high level of unemployment, particularly in young people below 18 (see section 4.3.4).

Figure 2.5 Annual change in RPI and unemployment, 1979-1997



Source: ONS (2009a; 2009c)

Moreover, it should be noted that the government's economic policy contributed to this situation. The Thatcher government of 1979 is regarded as the most radical government since the Labour government of 1945. The central bases of the post-war consensus such as the welfare state, the mixed economy and the use of Keynesian demand management to ensure full employment were overturned through a series of New Right liberal economic experiments. The Thatcher government's economic policy came from the judgement that the British economy had been weakened by causes such as inflationary monetary policies, an inefficient public sector, powerful trade unions, and profligate government spending (Dearlove and Saunders, 2000: 524).

The main directions of the Thatcher government's economic policy were well reflected in the Queen's Speech in May 1979 as follows:

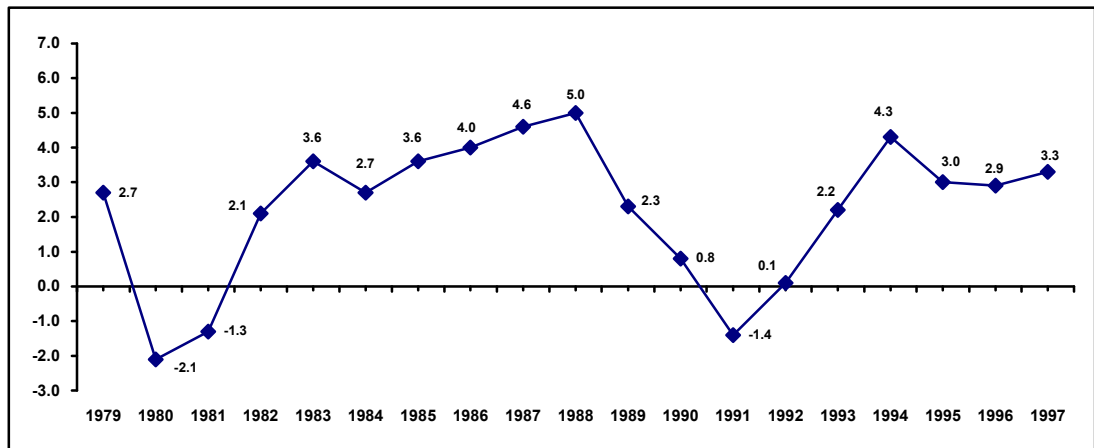
My Government will give priority in economic policy to controlling inflation through the pursuit of firm monetary and fiscal policies. By reducing the burden of direct taxation and restricting the claims of the public sector on the nation's resources they will start to restore incentives, encourage efficiency and create a climate in which commerce and industry can flourish.

(cited in Fry, 1984: 322)

Tight monetary control started in the Callaghan government, according to the demands of the IMF since 1976. However, it was the Thatcher government which was spontaneously committed to monetarism, as advocated by Milton Freedman, to maintain low inflation, with a belief that inflation could be controlled by tightening the money supply including state expenditure. Contrary to Keynesians willingly expanding the money supply to dampen unemployment, monetarists place emphasis on the tight control of the money supply and state expenditure to avoid inflation. Between 1979 and 1987, the Thatcher government arranged a 'medium-term financial strategy' and committed itself to meeting the announced monetary targets for state expenditure and growth in the money supply (Floud and Johnson, 2004: 158). As Figure 2.5 shows, this strategy was successful in reducing inflation, but this was achieved at the cost of substantially high unemployment.

The Thatcher government carried out a series of radical experiments during its term, and its legacy was inherited by the Major government. During the eighteen years of Conservative rule from 1979 to 1997, Britain performed particularly well in the second half of the 1980s. Figure 2.6 shows that between 1985 and 1988, British annual growth rates of GDP were consistently increased. However, after that period, the British economy was comparatively in decline again until 1991. This economic upturn in the second half of the 1980s contributed to increasing difficulty in recruiting teachers, so the government introduced new routes into teaching, particularly in teacher-shortage subjects (see section 3.3.4). Conversely, the economic downturn in the early 1990s contributed to lessening the problem of teacher shortages, which helped the government to introduce strengthened criteria for ITT (see section 3.3.3).

Figure 2.6 Annual change in GDP, 1979-1997



Source: ONS (2009c)

2.3.3. Government strategies

2.3.3.1. Privatisation (marketisation) strategy

A commitment to privatisation was a major feature of the Thatcherite governments imbued with New Right ideologies. There were no statements for radical privatisation in the 1979 election manifesto, but, as time went by, the scale of privatisation in Britain from 1979 onwards became greater than elsewhere. The two major kinds of privatisation are the privatisation of assets and of services, and a number of state assets were transferred from public to private ownership (Gamble, 1989: 9). During the Thatcherite governments, many organisations in a wide range of industries were privatised (see Appendix 2.4).

From New Right or neo-liberal perspectives, what made the Thatcherite governments commit to privatisation is that the Conservatives were convinced that markets are superior to governments⁴. Privatisation usually emerges as a political alternative when the government's aims are steered at reducing government involvement in industry, increasing efficiency, reducing the public sector borrowing requirement, curbing public sector union power, and widening shareholders, together with gaining political

⁴ According to Gamble (1989:5), four arguments are found in the New Right literature about markets' superiority: state intervention does not work; all alternatives to markets are deeply flawed; government failure is more prevalent than market failure; anything beyond the minimal state violates individual rights.

advantage (Marsh, 1991). The emphases of privatisation in the Thatcherite governments were mainly placed on competition, individual choice and marketisation in the public sector, dismantling the state monopoly industries. In particular, privatisation can be understood as marketisation in terms of neo-liberal educational reforms made by the Thatcherite governments.

From an orthodox perspective, the key features of a market are ‘an absence of state provision and funding, minimal regulation, easy entry for new suppliers, and the operation of a price mechanism responsive to supply and demand’ (Jones, 2003: 115). Yet, the Conservative policies pursued for educational reform were different from this orthodoxy, in that the government was mainly concerned with ‘choice’ reforms within a ‘heavily regulated, state provided and funded system’ (Tooley, 1999: 11). However, with regard to competition and differentiation within the school system, marketisation ‘brought about major shifts in the management and cultures of schools and the behaviour of large groups of parents and school students’ (Jones, 2003: 115). For the Conservatives imbued with neo-liberalism, much confidence was placed in the market or private sector rather than the state or public sector, showing a lack of commitment to the state system. The Thatcherite governments aimed to enhance marketisation or privatisation by the introduction of competition and choice in education.

2.3.3.2. Raising central control strategy

Another strategy employed by the Thatcherite governments under New Right ideologies can be termed as the ‘raising central control strategy’, which is also related to the privatisation strategy. In contrast to the post-war era governments employing the post-war partnership strategy, the Thatcherite governments consistently attempted to raise central control, reducing the power of the so-called ‘educational establishment’ such as teachers and their unions, training institutions and HEIs, national/local inspectors and advisors, civil servants, and LEAs. In the policy process, the Thatcherite governments regarded these groups as opponents to their programme of reforming education. As we shall see in the subsequent chapters, the Thatcherite governments strengthened control over ITT, the school curriculum and teachers’ conditions of service, and the LEAs’ powers were reduced by a series of legislation.

In particular, during Thatcher's second term in office, there was substantial reform of the trade unions. The Thatcher government was committed to reducing the power of the unions, and its attitude and approach towards them were well reflected in the year-long miners' strikes in 1984/85 against the government's pit closure programme (Dorey, 1995: 176-180). The government kept its firm stance against the National Union of Mineworkers (NUM), repeatedly rejecting the claims of the NUM leader, and finally gained concession from the NUM leadership without a deal. The most significant measures for trade union reform such as pre-strike ballots, leadership-election ballots and the abolition of the closed shop were introduced during the Thatcher government, as a result of which the trade unions came to rapidly lose their power throughout the 1980s.

In addition, reform of the civil service became a main issue when Thatcher came to office in 1979. It is said that Thatcher 'considered public-sector employment a necessary evil and was determined to reduce its burden on the state' (Evans, 1997a: 53). It was under the first Thatcher government that the Civil Service Department, established in 1968, was abolished, which enabled Thatcher to easily appoint the most civil senior posts. The Thatcher government attempted to strengthen political control over the work of government departments and de-privilege the civil service through civil service reform (Fry, 1984: 323). As a result, during the Thatcher government, the number of civil servants was reduced from 732,000 to 567,000 (Evans, 1997a: 55). The introduction of the market principle and choice into education could also be seen as part of this process of public service reform.

2.4. New Labour Governments of 1997-2008

2.4.1. Political ideology: the Third Way

Undergoing eighteen years as the opposition, Labour began to recognise the need for transformation from ‘Old Labour’. As a consequence, ‘New Labour’⁵ emerged as an alternative brand under the leadership of Tony Blair in 1994 to regain public support by deliberately distancing itself from its past. Through the brand, the Labour Party began to succeed in demonstrating itself as ‘an ideologically moderate and significantly reformed social democratic party’, different from the old right or the old left or the new left of it (Beech, 2006: 107). That is, a pragmatic shift in the Labour Party towards the new right-wing started with New Labour, alongside the replacement of the party’s old ‘clause four’ commitment to common ownership with democratic socialism. It is perceived that every major left party in Europe moved rightward between 1984 and 1995, but ‘none moved as far rightward as the Labour parties in Australia, New Zealand and the United Kingdom’ (Campbell and Rockman, 2001: 38).

Labour’s endeavour finally came to fruition. New Labour, led by Blair, won a landslide victory, which it had not experienced since the 1945 election, gaining 419 seats. With favourable economic performance, Blair succeeded in giving a triumphant victory to his party by winning the next consecutive two elections in 2001 and 2005. Tony Blair is the only Labour leader who has led the party to three consecutive general election victories, and the only Labour prime minister who has served more than one full consecutive term. The Blair years of 1997-2007 saw many significant domestic policies such as the introduction of the national minimum wage (NMW) by the National Minimum Wage Act 1998, constitutional reform by devolution in Scotland and Wales, the welfare-to-work policy, and market-based reforms in health and education. Conversely, Blair’s strong support for US foreign policy against terrorism by participating in the invasions of Afghanistan in 2001 and Iraq in 2003 consequently brought him fierce criticism. Facing much pressure from his party, Blair

⁵ The term ‘New Labour’ was first used at the party conference of 1994 in the phrase on the conference platform: ‘New Labour; New Britain’ (Beech, 2006:101).

handed over his leadership to Gordon Brown, the then Chancellor of the Exchequer, who formally took office as Prime Minister on 27 June 2007.

The nature of New Labour has been a frequently debated theme among academics since its emergence in 1994. Although scholars concerned with the theme employ various perspectives (Allender, 2001: 56), they can be largely divided between those who focus on the continuity with Old Labour and those who focus on the novelty and break of New Labour from the past, in terms of Labour's traditions or of the established ideological spectrum. Scholars following the perspective of the continuity of New Labour with Old Labour tend to argue that the objectives and core values of the New Labour governments are not dissimilar to those of the post-war Labour governments, and that New Labour uses just different means to achieve these objectives, modernising itself to catch up with the changing circumstances of new times (Foote, 1997; Rubinstein, 2000; Bevir and O'Brien, 2001). By contrast, scholars championing the perspective of the novelty of New Labour tend to argue that New Labour marks a clear break from its post-war governments in terms of its traditions or ideological stands, pointing out some Thatcherite policy directions such as the continuation of privatisation, an avoidance of tax burden on the middle class, contracting out, purchaser/provider split, and welfare-to-work policy (Hay, 1999; Heffernan, 2000; Powell, 2000; Larkin, 2001).

Tony Blair's political beliefs in New Labour were frequently mentioned in relation to the 'Third Way' ideas in the 1990s. In a Fabian pamphlet (Blair, 1998: 1), Blair himself defined the Third Way as 'a modernised social democracy, passionate in its commitment to social justice and the goals of the centre-left, but flexible, innovative and forward-looking in the means to achieve them', and argued that 'it is a *third* way because it moves decisively beyond an Old Left preoccupied by state control, high taxation and producer interests; and a New Right treating public investment, and often the very notions of "society" and collective endeavour, as evils to be undone'. The Third Way largely relies on Giddens' ideas, and also contains the elements of Hutton's stakeholding and Etzioni's communitarianism (Temple, 2000), along with its basic values such as opportunity, responsibility, community and accountability (Blair, 1998; Le Grand, 1998). Fitzpatrick (1998: 14-15) locates New Labour's ideological position as one of market collectivism, which is positioned between state collectivism

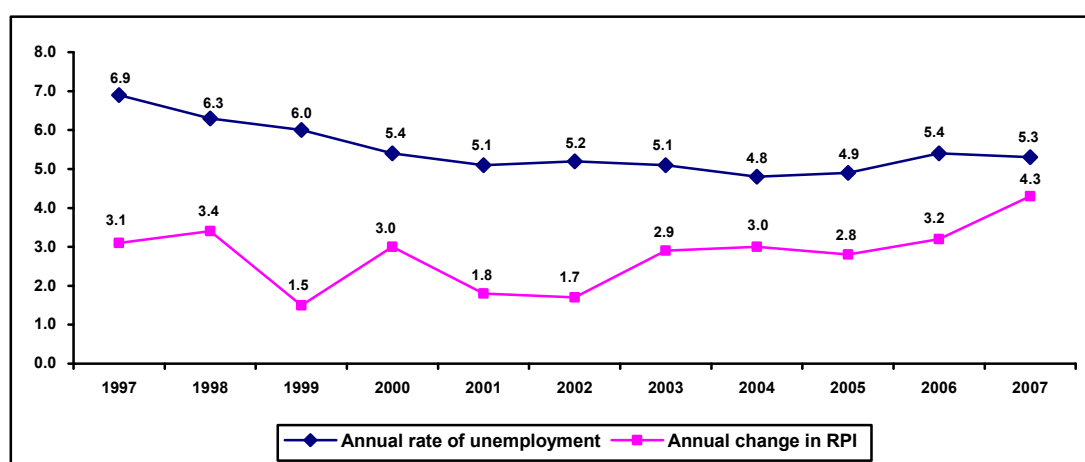
representing Keynes-Beveridge welfare prevalent in the post-war governments and market individualism representing the ideal of the New Right's economic liberals.

Under the Third Way, the government acts as an investor, placing an emphasis on social inclusion, pragmatic social expenditure and public/private partnership (see Appendix 2.5). New Labour suggested its four objectives (Blair, 1998: 7): a dynamic, knowledge-based economy founded on individual empowerment and opportunity, where governments enable, not command, and the power of the market is harnessed to serve the public interest; a strong civil society enshrining rights and responsibilities, where the government is a partner to strong communities; a modern government based on partnership and decentralisation, where democracy is deepened to suit the modern age; and a foreign policy based on international cooperation. These objectives are not dissimilar to social justice and economic efficiency, which were the objectives of the Labour governments during the post-war era. However, the emphasis shifts from the equality of outcome to the equality of opportunity (Driver and Martell, 2000; Fairclough, 2000).

2.4.2. Socio-economic situations

Under the New Labour governments, Britain experienced economic stability in terms of employment and inflation. As Figure 2.7 shows, during Blair's first term of office, the unemployment rate fell steadily, and during his second term it reached the lowest rate of 4.8 per cent in 2004. The average unemployment rate during the period of New Labour was much lower than that in the Thatcherite governments. Furthermore, annual inflation rates were comparatively stable under New Labour. In contrast to the striking trade-off between annual unemployment and inflation rates during the rule of the Thatcherite governments, there appears to be no such trade-off between them under the New Labour governments. New Labour's economic policy partly led to this comparatively low unemployment and stability in inflation. Under the Third Way, New Labour took its stance for economic policy to be characterised as 'an eclectic blend' between various economic ideas (Annesley and Gamble, 2004: 149).

Figure 2.7 Annual change in unemployment and RPI, 1997-2007

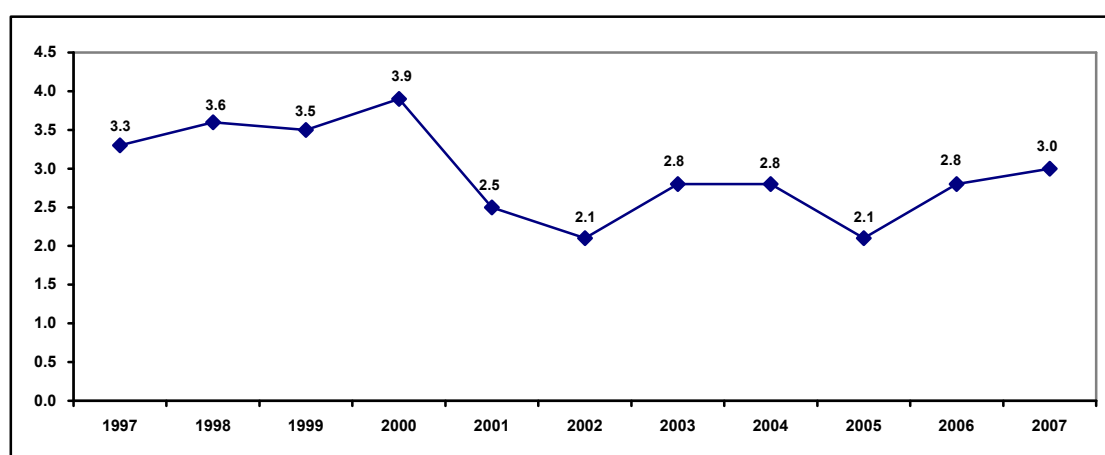


Source: ONS (2009a; 2009c)

In its 1997 manifesto⁶, New Labour emphasised economic stability with long-term goals, trying to gain public credibility. Along with the two strict fiscal rules, pledged in its 1997 manifesto, to maintain sound public finances, the Blair government pursued a sound monetary policy for stable inflation through giving the Bank of England operational independence for the conduct of monetary policy and the authority to set targets for inflation, with a view to enhancing ‘its credibility in the eyes of the financial markets’ (Glyn and Wood, 2001: 51). Under the slogan of ‘welfare to work’, representing conditional or contractarian welfare reform (Barrientos and Powell, 2004:19), various schemes such as New Deal schemes, tax credits and NMW were introduced in order to reduce unemployment, thereby leading to a striking reduction in the number of claimants (ONS, 2009d). With this economic policy, as Figure 2.8 below shows, the British economy experienced stable growth under the New Labour governments, although it underwent a slight downturn during the second Blair government.

⁶ The 1997 Labour manifesto (Labour Party, 1997) includes pledges such as ‘economic stability to promote investment’, ‘tough inflation target’, ‘stick for two years within existing spending limits’, ‘no increase in income tax rates’ for five years, ‘long-term objective of ten pence starting rate of income tax’, and ‘early budget to get people off welfare and into work’.

Figure 2.8 Annual GDP growth rate, 1997-2007



Source: ONS (2009b)

Influential socio-economic situations in the policy process include growing global competition in a more globalised and knowledge-based economy and growing concern for childcare. Globalisation became more intensified in the 1990s. The crucial implications of globalisation for education lay in the changed role of the state in response to the failures of the welfare state and Keynesian model, neo-liberal pressures to restructure postsecondary educational systems' flexibly to meet new industrial production, and a call for reorganising primary and secondary education and teacher education in order to correspond to the skills and educational qualifications required by workers in a globalising world (Morrow and Torres, 2000: 35). The Competition Act 1998 represented an industrial policy in the Blair government that was strongly pro-business and pro-competition, and the concepts of knowledge, skills and creativity were stressed in a series of documents (DTI, 1998; 2001; DfES et al., 2003a; 2005a) as a means to enhance competitiveness and productivity under the challenges of the knowledge-based economy.

The growing concern for childcare was triggered by the tragic death of a young girl, Victoria Climbié, in 2000. Following a public inquiry, comprehensive initiatives for childcare were embodied by the Green Paper (HMT, 2003) *Every Child Matters*. This Green Paper was followed by the Children Act 2004, which provides the legislative platform for developing more effective and accessible services to meet the needs of children, young people and families. As part of this development, an 'extended

schools' programme was introduced to ensure that schools provide extended services covering from childcare to adult education (DfES, 2005a: 7).

2.4.3. Government strategies

2.4.3.1. Modernisation for raising standards strategy

There is no doubt that education has been regarded as important by most post-war governments. However, it was New Labour that made education a core agenda of government. In its 1997 manifesto, New Labour strongly pledged it would make education its 'number one priority' (Labour Party, 1997: 7) alongside a catchphrase of 'education, education, education' during the election campaign. Further, the directions of New Labour's education policy can be understood under the Third Way. The frequently found concepts in the policy documents include choice, diversity, excellence, standards, partnership and modernisation. In particular, under the Third Way ideology, the government, since 1997, increasingly used the term 'modernisation', coined as a descriptor of far-reaching reforms in public services. As Powell (2008: 5) points out, modernisation was first used to brand the reform of the Labour Party in opposition and 'it quickly became a specific term for the changes demanded by New Labour in the organisation of the public sector'.

The term 'modern' was prominent in the titles of key government documents between 1997 and 1999 (DoH, 1997; 1998; DETR, 1998; HMT, 1998; CO, 1999). In these documents, any clear definitions of modernisation were not presented, but it is clear that the government used the theme of modernisation as 'a label attached to a wide range of institutional reforms, including those of government, party and the political process itself' (Newman, 2001: 40). Under the New Labour governments, the theme of modernisation has been applied to almost all policy areas. In the foreword to *Modernising Government*, Blair himself states that:

The Government has a mission to modernise – renewing our country for the new millennium. We are modernising our schools, our hospitals, our economy and our criminal justice system... But modernisation must go further. It must engage with

how government itself works. Modernising government is a vital part of our programme of renewal for Britain.

(CO, 1999: 4)

Under the ideology of the Third Way, New Labour marked out its departure from Old Labour politics and signified its intention to reconfigure relationships between public and private, economy and state, government and people, through employing the theme of modernisation, appropriate for the globalised and knowledge-based economy, as its major strategy for this reconfiguration. In order to modernise social services, New Labour focused on improving protection, standards in the workforce, partnerships, and delivery and efficiency (DoH, 1998). As far as education is concerned, the government addressed its modernisation strategy in connection with raising standards in education. The government envisaged its modernisation strategy in its first White Paper (DfEE, 1997a), placing emphasis on the notions of ‘standards and accountability’, ‘modernising the comprehensive principle’, and a ‘new partnership’. This strategy was more clearly embodied by a wide range of proposals for teacher policies in the 1998 Green Paper (DfEE, 1998a).

Modernisation is an overriding concept for New Labour and it is related to the increasing challenges of globalisation. As Newman (2001: 48) puts it: ‘modernisation is situated in a number of structural forces – globalisation, competition and meritocracy – that are collapsed into a single unifying theme. Globalization occupies a special place at the core of these series of narratives that construct an imperative to change’. New Labour was involved in modernising education to raise its standards, since it saw education as ‘being able to create economic growth in the flexible, knowledge-based economies of the twenty-first century, and to promote social inclusion by creating pathways out of poverty’ (Furlong, 2005: 123).

2.4.3.2. New partnership strategy

In addition to the theme of modernisation, New Labour, since its election in 1997, emphasised a collaborative discourse in which networking and collaborative relationships between public, private and voluntary sectors were the intentional outcomes of many of the government’s policy initiatives (Clarence and Painter, 1998; Kirkpatrick, 1999; Painter, 1999; Huxham, 2000; Balloch and Taylor, 2001). In

addressing this collaborative discourse, the government used a variety of terms in its policy documents across fields such as partnership, coordination, joined-up government, inter-agency working, integrated delivery, and seamless services, among which the term 'partnership' is particularly widely used (Powell and Glendinning, 2002: 1). Partnerships can take various forms according to the relationships between different sectors including public-public, public-voluntary, public-community and public-private. Such relationships are not distinctive to New Labour since the traditional form of partnership in welfare between the state and the voluntary sector can be traced back to the 1601 Poor Law and the 1929 Local Government Act, predating the post-war welfare state. As noted, the post-war partnership was instituted by the 1944 Act and, under the post-war consensus, operated during the post-war era governments.

However, it is a 'new' partnership that New Labour emphasised in its policy documents. In its first White Paper, the government gave its priority to standards instead of school structure, and raised the need for a new partnership as 'a new and clear framework in which all the partners understand their roles and can work effectively together towards the common goal of raising standards' (DfEE, 1997a: 66). Under this 'new partnership' framework, the government intended, on the one hand, to continue the Thatcherite educational policies aimed at enhancing marketisation by the introduction of competition and choice in education such as grammar schools, grant-maintained (GM) status and Local Management of Schools (LMS), but, on the other, to allow LEAs, which had been much marginalised under the Thatcherite governments, to undertake more active roles (DfEE, 1997a: 66-73). This strategy is a reflection of New Labour's political ideology. The Third Way represented partnership, distinctive from both the centralised bureaucratic hierarchies of Old Labour and the market of the Conservatives. For New Labour, the Third Way was 'about combining public and private provision in a new partnership for the new age' (DSS, 1998a: 19). Like other public services such as health and pensions, education was seen under New Labour as a main service which should be provided on the basis of partnership between individuals, organisations and government.

Chapter 3: Policies on Initial Teacher Training

In the previous chapter, government strategies, which are crucial in the analytical framework for this study, were identified, together with certain political ideologies and socio-economic situations. This chapter addresses teacher policies in the first teacher policy area of initial teacher training. According to the analytical framework, policies in the early era governments will be analysed in terms of HILs, and policies in the other three groups of government will be analysed largely in terms of government strategies and IILs.

3.1. HILs in the Early Era Governments

3.1.1. Apprenticeship: an early form of school-based teacher training

The monitorial system

In the eighteenth century, gestures toward establishing the institutional form of teacher training were made, particularly by the Society for Promoting Christian Knowledge (SPCK), founded by members of the Church of England in 1698. The SPCK was involved in providing charity schools for poor children, with a view to promoting the practice of Christianity and virtue (SPCK, 1711: 50). The early leaders of the SPCK saw school teaching as a skilled craft that demanded training, and therefore sought to establish a ‘normal school’ but unfortunately failed to raise the necessary funds (Dent, 1977: 2). It was in the nineteenth century that a systematic form of teacher training at an elementary level began to emerge. At the dawn of the nineteenth century, two notable men, Andrew Bell (1753-1832) and Joseph Lancaster (1778-1838), played a key role in establishing the so-called ‘monitorial system’. The core of the monitorial system is to use promising pupils as monitors (helpers) who teach other pupils in their class under the supervision of schoolmasters, which can be understood in modern terms as ‘peer tutoring’.

The monitorial system was not original. Even in 'public' schools such as Winchester and Eton, it had been used for the prepositors and prefects (Barnard, 1961: 52). However, it was through the intervention of Bell, who was an Anglican, and Lancaster, who was a Quaker, that the monitorial system was developed on a large and organised scale. Bell experimented on this system, teaching in Madras, India from 1789 to 1796, and then introduced the system to England with publications on the successful result of its introduction (Bell, 1805; 1808). In 1798, Lancaster opened a school in part of his father's house in Southwark. As the number of pupils increased, he moved to larger premises in Borough Road and used monitors to cope with his additional charges (Lancaster, 1821). The roles of monitors, who were essential in the Lancasterian school, were described as follows:

When a child was admitted, a monitor assigned him to his class; while he remained, a monitor taught him (with nine other pupils); when he was absent, one monitor ascertained the fact, and another found out the reason; a monitor examined him periodically, and when he made progress, a monitor promoted him; a monitor ruled the writing paper; a monitor made or mended the pens; a monitor had charge of the slates and books; and a monitor-general looked after all the other monitors.

Salmon (1904: 7)

Lancaster promoted his ideas on the monitorial system through his writings (1803; 1807). The first decade of the nineteenth century saw the height of his system, together with the foundation of the Society for Promoting the Lancasterian System for the Education of the Poor in 1808, renamed in 1814 the British and Foreign School Society, and his schemes and methods spread to the Continent and the colonies. Bell also promoted his own ideas on the Madras system through his 1808 publication, garnering a great deal of support. In 1811, the National Society was founded, taking over from the charity schools which had been sponsored by the SPCK since the eighteenth century. By 1830, there were about 346,000 children receiving an elementary education in church schools, which followed Bell's monitorial system and were sponsored by the National Society (Barnard, 1961: 56).

Socio-economic situations at this time helped the monitorial system to be prevalent in the early nineteenth century in England. With the industrial revolution there was a rapid increase in the population, concentrating in the towns of the new industrial areas (see section 2.1.1), which led to shortages both of schools and teachers. In this situation, the monitorial system was an effective alternative for the elementary schools for the poor at this time. It provided a means to operate schools cheaply, like factories run cheaply with child labour, because monitors were not paid. In an extreme case, only one headmaster who supervised the monitors might be needed in the monitorial school. In other words, it was useful for schools to overcome financial difficulties. In addition, it gave a way of overcoming the problem of teacher shortages during the industrial revolution.

The monitorial system is significant in that it shaped the prototype of teacher training in England. The earliest teacher training establishments were located in the model schools with model classrooms for teaching practices: in 1808, the first teacher training college in Britain, Borough Road College, was set up by Lancaster in the central model school of the British and Foreign School Society; in 1811 Baldwin's Gardens, which was transferred to Westminster in 1832, was set up by Bell in the central model school of the National Society (Seaborne, 1974: 326; Dent, 1977: 5; Thomas, 1990a: 1). Bell and Lancaster, through their societies, placed an emphasis on 'model schools', where the monitorial system could be demonstrated for all to see, and on 'normal schools' for the training of teachers in the system. This rudimentary system of teacher training became prevalent in England and lasted until the late 1830s. Another significant legacy of the monitorial system for English teacher education was the establishment of a tradition of apprenticeship. The monitorial system is a type of apprenticeship which can be found in many other areas throughout English history, since the monitors were apprentices learning how to teach by working and teaching in their schools.

The pupil-teacher system

By the 1830s, despite its economy, the monitorial system proved inefficient due to its shortcomings. Under the system, the monitor was required, without sufficient training for teaching, to perform a mechanical role as a conduit of knowledge from the headteacher to the other pupils, it being assumed that 'the monitor needed to be but a

very little in advance of his fellow pupils' (ED, 1898:1). Therefore, the quality of their teaching was inevitably low. Moreover, as monitors were elementary pupils, it was suggested that they were too young to be trained as teachers. Some gestures towards overcoming these shortcomings came from David Stow and Kay-Shuttleworth. In 1837, Stow opened the Glasgow Normal Seminary, which led to the break-up of the monitorial system in Scotland through the development of 'the simultaneous system of class teaching in which an appropriately trained adult teacher directed the learning and moral development of a very large class of children' (Evans, 1975: 117). Kay-Shuttleworth devised the so-called pupil-teacher system as a reform of the monitorial system, incorporating the elements of the Stow system (ED, 1898: 1). This system was officially instituted in England and Wales through the 1846 Minutes (CPCE, 1846b).

Under the 1846 regime (CPCE, 1846b: 1-6), pupil-teachers were selected from promising children at the age of thirteen to be apprenticed to the master or mistress for a term of five years in elementary schools and examined by the Inspector on a prescribed graded syllabus at the end of each year. If they performed successfully, the government paid the master or mistress a grant per annum of £5 for one pupil-teacher, £9 for two, £12 for three and £3 for each additional apprentice. At the end of the apprenticeship, the pupil-teachers could sit for a competitive examination for Queen's Scholarships, entitling them to a three-year course at a training college. At the end of the course they qualified as certificated teachers.

The pupil-teacher system developed from the monitorial system, so in this respect they shared some similarities. Apprenticeship was still used in the pupil-teacher system, and the status of monitors and pupils in the pupil-teacher system was the same as a pupil. The pupil-teacher also received instruction from his master. The main difference, however, is that while monitors were their classmates' helpers, pupil-teachers were pre-teachers who were in charge of teaching and classes in the same way as a normal teacher was. Initially, one pupil-teacher was allowed for every twenty-five scholars (CPCE, 1846b: 3), and gradually 'the proportion of one girl pupil-teacher to every forty scholars and one boy to every fifty became the established practice' (Hurt, 1971: 94).

The pupil-teacher system provides some significant insights into the history of teacher education in England. First of all, this system played a key role in providing a bridge which connected the five-year gap between the graduation from elementary schools and entry into a training college at the age of 18. As Aldrich (1990: 15) puts it, the pupil-teacher system provided ‘a substitute secondary, or higher elementary, education for children who would have had no chance of access to grammar, public or equivalent private schools’. Another important aspect is that, finally, state intervention in teacher education in England began partly with the introduction of the pupil-teacher system in 1846. From that point in time, the government began to exert influence on the shaping of institutions for teacher education. State intervention was strengthened with the introduction of the Revised Code of 1862 (CPCE, 1862a), restricting the syllabus of teacher training to those subjects which intending teachers would afterwards have to teach, along with the abolition of the fixed rates of both pupil-teachers’ pay and the augmentation of the salaries of those supervising them.

The pupil-teacher system was critically influenced by two Acts – the Elementary Education Act of 1870 and the Education Act of 1902. There were growing complaints about the poor educational standards of pupil-teachers when entering training colleges, and the school boards expanded after the 1870 Act began to establish ‘pupil-teacher centres’ in order to improve the quality of their pupil-teachers. This practice spread rapidly to the extent that in the 1890s most pupil-teachers received their education at pupil-teacher centres instead of the elementary schools in which they worked. The structure of the pupil-teacher system sizeably changed with the enactment of the Act of 1902, which made possible the rise of many state-aided secondary schools. Following the introduction of the Act, the BoE aimed to build up a secondary education system and recruit the future elementary teachers that had received a more sufficient secondary education.

In 1903, the BoE took its first step by issuing the Pupil-Teacher Regulations of 1903 with the intention ‘to secure for the pupil-teacher a more complete and continuous education, and to make the period of service in an elementary school a time of probation and training rather of too early practice in teaching’ (BoE, 1903a: 5). As a result of the regulations, the minimum age for pupil-teachers was raised to sixteen except in rural areas, the normal period of apprenticeship was reduced to two years,

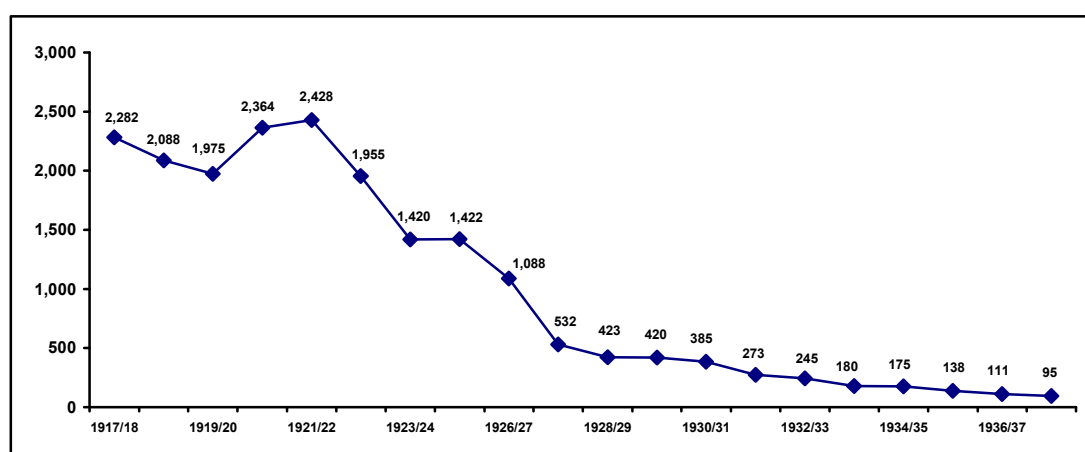
and a minimum of 300 hours of instruction in approved centres or classes of pupil-teachers was made compulsory. These regulations were followed by Circular 494 (BoE, 1903b), emphasising the fullest possible use of secondary schools for preliminary training purposes by drawing candidates for elementary teachers from the pool of secondary school pupils.

Under the 1903 Regulations, pupil-teachers from the age of sixteen attended their secondary schools on a part-time basis, which led to a disorganisation of work in the secondary schools. In 1907, a new scheme, known as the ‘bursar system’, instituted an alternative to the existing method of pupil-teachership, enabling full-time secondary education to continue until the age of 17 or 18 with the aid of a bursary grant from the government (BoE, 1909: 57). Under this scheme, secondary school pupils of sixteen and over who intended to teach could remain at school until seventeen or eighteen as a ‘bursar’, and then could enter a training college or become ‘student teachers’ for a year prior to entering college, spending half of their time in elementary schools for actual practice and the other half in secondary schools for the continuation of their studies. The new scheme, however, led to a rapid decrease in the number of entrants to the profession. The number of entrants, including bursars, fell from 11,018 in 1906/07 to 4,308 in 1912/13, and then slightly rose again (see Appendix 3.1). The main reason for this fall was ‘the postponement of the time of wage-earning involved in the “bursar” system’, since this postponement consequently prevented working class children in need of an early wage-earning occupation from entering the profession (BoE, 1914: 150).

The bursary system was weakened by the 1921 Regulations (BoE, 1921a), whereby the special provisions afforded to the recognition of bursars were terminated and the provision of special assistance for secondary pupils intending to be a teacher laid within the discretion of LEAs (BoE, 1923: 54). In March 1923, the government appointed a departmental committee, chaired by Lord Burnham, to ‘review the arrangements for the training of teachers for public elementary schools’ (BoE, 1925: 9). In 1925, the departmental committee produced a report (BoE, 1925) with comprehensive recommendations which, as we shall see in the subsequent sections, led to significant changes in the whole teacher training and certification system. In relation to the pupil-teacher system, the committee made a recommendation that

‘intending teachers should, as far as practicable, receive continuous full-time education in secondary schools up to the age of 18’ (BoE, 1927a: 91), which meant an end to pupil/student-teachership. Pursuant to the recommendation, from 1927 the recognition of pupil-teachers and student-teachers was confined to areas where full-time secondary education up to the age could not be provided. As Figure 3.1 demonstrates, the life of the pupil-teacher system lasted until 1938 on a small scale.

Figure 3.1 Pupil-teachers appointed firstly in England and Wales, 1917-1938



Source: Gosden (1972: 276)

The monitorial and pupil-teacher systems, run on the basis of apprenticeship, can be understood as an early form of school-based teacher training in that monitors and pupil-teachers were trained in the schools in which they were working. In terms of HILs, this tradition of apprenticeship in teacher training, established under these two systems, has had a long effect on the past and current teacher education system in England. The tradition of apprenticeship was strongly reflected in various initiatives of school-based teacher training during the Thatcherite and New Labour governments, including ATS, LTS, SCITT, GTP, RTP, and TF (see sections 3.3.4, 3.4.4, and 3.4.5).

3.1.2. Training colleges and university departments of education

Early training colleges

It is widely supposed in England that training colleges have been connected with the training of teachers for elementary schools, whilst university departments of education (UDEs) have been concerned with the training of teachers for secondary schools. From the early nineteenth century the early training colleges began to be established by religious bodies. In 1835, the state started to intervene in the provision of teacher training by granting £10,000 in equal proportions to the National and British Societies for 'the erection of normal or model schools' (CPCE, 1839). From its inception, the CPCE favoured the foundation of a state training college, but conflicting views on the provision of religious instruction acted as a deterrent to further progress (BoE, 1914: 11). During 1843/44, the CPCE determined the conditions of building grants under which all applications for aid to normal schools should be conveyed to it through the channel of the two societies (CPCE, 1844: 2).

Before 1846, various residential colleges were established, by societies or individuals, in Borough Road and at Battersea, Chelsea, Chester, Whiteland, Salisbury, Warrington, York, Durham, and Brecon (BoE, 1914: 11-12). The early training colleges at this time had some differences in terms of their operation. The 1846 Minutes show that the period of training among the church training colleges in 1845 ranged widely from a minimum of three months to a maximum of five years (CPCE, 1846a: 214). The syllabuses of study in the early training colleges included a wide range of subject matter. For example, at St. Mark's College, the subjects of instruction included 'scriptural knowledge and Bible literature, the doctrines of the church and church history, Latin, music, English grammar, general history, English literature, geography, algebra, geometry, mechanics, arithmetic, drawing, and the art of teaching under the designation of normal lessons' (CPCE, 1845: 293).

After the introduction of the pupil-teacher system from 1846, state intervention in teacher training provided by the training colleges was furthered. For the first nine years following the introduction, training colleges were examined individually, and there was no fixed syllabus of instruction. However, the provision of the certificate examination for the training college students by the government and the responsibility

of HM Inspectors for its structure brought about an increasing uniformity in the work of the colleges, and as a consequence a syllabus for the colleges was introduced in 1854 by the CPCE (Taylor, 1969: 98). By 1856, the duration of courses in training colleges was fixed at two years, except in some specialist colleges. Before 1856, a three-year course was originally hoped for, but the number of entrants to the colleges was not sufficient and the majority of the college students left after the completion of one year of training (BoE, 1914: 16-17). In 1856, the government made a vital change by reducing the training college course to two years, providing a two-year grant for entrants alongside their 'pledge' to teach after graduation (BoE, 1914: 17).

With the introduction of the Revised Code of 1862 (see section 4.1.2), training colleges experienced a hard time until the demand for teachers was felt by the effects of the 1870 Act. Under the code, in much the same way that grants paid to schools were determined by their scholars' success in the annual examinations, the sum paid to a training college was determined by the grade of pass attained by the student – between £13 and £20 for first-year and £16 and £24 for second-year candidates (CPCE, 1862a: 19). Furthermore, greater attention was paid to the subjects on the elementary school curriculum, dropping the subjects of physical science, mechanics, higher mathematics, English literature and Latin from the range of subjects forming the certification in the second year's work (CPCE, 1863: xxxii).

The training of teachers before 1890 was mainly based on the pupil-teacher system in connection with training colleges. Two problems, however, emerged from this system. First, the number of places provided by the training colleges was not sufficient, so only half the pupil-teachers who completed their apprenticeship were admitted to the residential training colleges (BoE, 1914: 18). Another problem was that most training colleges were religious foundations – mainly Church of England – except a small number of non-denominational colleges. Consequently, little opportunity for college training was given to those pupil-teachers who had served in board schools with non-denominational teaching. By 1890, there were forty-three voluntary residential training colleges in England and Wales, of which only eight were non-denominational (CPCE, 1891: 516).

Day training colleges towards university departments of education

During the 1880s, the school boards, dissatisfied with this situation, attempted to establish their own colleges in connection with neighbouring university colleges, which was impossible under the 1870 Act, by presenting their schemes to the government. The Cross Commission was appointed in 1886 to ‘inquire into the working of the Elementary Education Act, England and Wales’ (CCb, 1888: xx). In 1888, the Commission recommended, through its final report (CCb, 1888), that day training colleges should be provided in university institutions. Pursuant to this recommendation, the government altered the definition of a training college in the Elementary School Code of 1890 (ED, 1890a: 19), and permitted universities and university colleges to establish day training colleges. According to the code (ED, 1890a: 19-21), the day college ‘must be attached to some university or college of university rank’ in order to be recognised, and the authorities of the college must be ‘a local committee’; maintenance grants and tuition grants were authorised, whilst the length of the course, the syllabuses and regulations for the certificate examination, the requirements of a medical certificate of fitness, and a declaration of intention to teach in an elementary school remained unchanged.

Circular 187 (ED, 1890b) followed the code, laying down regulations on day training colleges in detail. Under this Circular, candidates for Queen’s Scholarships were able to opt for residential or day training colleges; local committees were responsible for making arrangements for lecturers, school practice and lessons in day training colleges and for sending copies of these arrangements to the ED. ED examinations in professional subjects should still be taken by students in day training colleges, but those examinations in general subjects were replaced by college or university examinations with the proviso that the programme of studies was to be approved by the ED and examination answers sent to the ED to be adjusted to the residential college standards. Between 1890 and 1902, eighteen day training colleges were set up in connection with universities or university colleges (see Appendix 3.2).

Day training colleges operated on a modest scale in their first decade (see Appendix 3.3). However, the scale was not small, given the fact that forty-nine colleges in all provided just 3,679 places in 1890 (BoE, 1914: 5) when some of the first day colleges were introduced. The advent of day training colleges was of great importance to the

institutional development of teacher education in England. First of all, as Thomas (1990b: 28) points out, the profession of teaching entered university life in England and Wales through these training colleges, breaking the monopoly of the old residential training college tradition and starting a dual system of teacher training thereafter. At this time, the involvement of universities in teacher training in association with training colleges was not seen as advantageous by some university staff, largely due to the poor reputation of the residential training colleges and the social origins of their students. Additionally, it was a prevalent belief that the elementary teachers did not need a university education (Hyams, 1979). Closer links with the universities were not greatly favoured by residential training colleges, with the feeling that universities were too academic and not sufficiently vocational. With the arrival of these colleges, universities began to be much more involved in teacher training.

Another significant point is that the day training colleges provided an opportunity for broadening the view of teacher training from professional or vocational to academic. In the course of time, the day training colleges became UDEs. In this respect, Rich (1933) believes that the day training college had a crucial effect in promoting the development of the study of education as an academic subject, and encouraging the growth of research and scholarship. In the growth of the modern university, the day training colleges stimulated increased numbers of arts and literature students (Shimmin, 1954; Armytage, 1955), with student teachers representing a major increase in numbers for the new universities and university colleges of late Victorian Britain. The day training colleges contributed to a close connection between the new universities and the BoE, and grew continually from 1900, providing 33 per cent of the training places by 1939, up from 25 per cent in 1900/1 (Thomas, 1990b: 19, 28).

LEA-maintained colleges and the Joint Board system

With the beginning of day training colleges, the number of training colleges increased in 1900 to sixty-one, providing 6,011 places for students (see Appendix 3.4). However, until 1900, college-trained teachers marked barely a quarter of the teaching force in elementary day schools: in 1900, of the 143,379 teachers employed in elementary day schools in England and Wales, there were just 36,968 college-trained teachers (BoE, 1901b: 26-27). This situation also reflected the limit of the voluntary

teacher training system run by the religious bodies. Of forty-four residential colleges in 1900/01, just two training colleges were non-denominational (BoE, 1901b: 50). It was with the Education Act of 1902, along with the BoE's Regulations, that the direct intervention of the state in the provision of teacher training became strengthened. Under the terms of the 1902 Act, the new LEAs were entitled not only to assist the existing colleges, but also to establish their own colleges.

In 1904, a new type of training college, which was to be maintained by LEAs and needed neither to be residential nor connected with a university, was officially recognised by the new Regulations (BoE, 1904c) as to training colleges, issued firstly as a separate volume from the existing elementary code. After this recognition, the LEA-maintained training colleges, called municipal colleges, grew rapidly along with encouragement by the provision of the building grant in 1905 (BoE, 1905a: v). By 1913, LEAs had established twenty training colleges, bringing the total to eighty-seven (BoE, 1914: 5). Before the outbreak of World War Two, the number of training colleges established by LEAs increased to twenty-eight (BoE, 1939: 191), and their most proficient students were being encouraged to stay on for a third year.

By the beginning of the 1920s, the syllabus for the two-year course consisted of obligatory professional subjects – the principles and practice of teaching, hygiene and physical training – and two groups (A and B) of other subjects, each of which having both ordinary and advanced courses (BoE, 1920a: 35-37). Group A included English, history, geography, mathematics, elementary science and Welsh, and, at the advanced level elementary, science was replaced with physics, chemistry and botany, and French was added. Group B consisted of singing and theory of music, drawing, needlework and handwork (for women only, and known as 'housecraft' at the advanced level) and, at the advanced level only, special handwork and gardening. Students intending to teach in elementary schools had to take at least five subjects: English and one other subject from Group A, two from Group B, and a fifth from either group. Students intending to work in post-primary schools were required to take at least four subjects: English and one other subject from group A, one from Group B and a fourth from either group.

In 1925, after considering the relationship between the training colleges and the universities, the Burnham departmental committee raised the need for much closer relations between them. In particular, the committee recommended the establishment of examining boards consisting of representatives of universities and the governing bodies of training colleges (BoE, 1925: 163). In December 1925, the BoE adopted the so-called Joint Board system, announcing in Circular 1372 that it would cease its functions as an examining body in academic subjects and limit its role to endorsing qualifications granted by responsible academic bodies (BoE, 1926a: 135). In 1930, the new Joint Boards conducted an examination on syllabuses under the arrangements subject to the approval of the BoE. However, any changes proposed in the syllabuses had to be submitted to the Central Advisory Committee for the Certification of Teachers (CACCT), established to inspect the work of the Joint Boards (BoE, 1931a: 61), so that such changes ‘took the form of the reduction in the number of subjects and their integration into single courses rather than any more fundamental revision’ (Taylor, 1969: 103).

UDEs and teacher training for secondary schools

Early institutions of initial teacher education for secondary schools were formed comparatively later than those for elementary schools. In the education history of England, the entry route of the teaching profession to secondary schools has long continued differently to that of elementary schools. As Partington (1999: 23) states: ‘the majority of teachers in independent schools had no professional training’ and ‘the more prestigious the school, the more likely was it that the new teacher was directly recruited after a first degree from Oxford or Cambridge’. For many elite private and state grammar schools, prominent university graduates might be regarded as good enough to teach without any initial teacher education. However, secondary teacher education began to shape its form with the opening of the day training colleges as early UDEs. As discussed, the early UDEs were established to train elementary teachers and provide two-year courses like other teacher training colleges, so it was a natural development for universities with UDEs to provide courses for secondary teachers.

Initially, the government limited the number of day students to be recognised as Queen’s Scholars to 200 (ED, 1890a: 20), although this limitation disappeared in the

subsequent Regulations. Accordingly, as Tuck (1973: 84) writes, ‘the early provision which was made was piecemeal, the number of students was small, and the secondary school students were either trained in separate departments, sometimes under only one tutor, or in separate groups in the same department’. However, the 1890 Regulations made provision for a third year of study for selected students, drawing no distinction between day and residential colleges (ED, 1890a: 20). This additional year, added on to the two-year course, ‘enabled many students to qualify on the academic side by obtaining degrees’ (BoE, 1925: 20). It is notable that universities and university colleges were less restricted by the tradition of the nineteenth century training colleges. Restrictions such as religious tests or residence requirements were not imposed on applicants for places at day training colleges. In addition, the government accepted examinations in academic subjects held by universities as equivalent to its own (BoE, 1914: 20).

After the 1902 Act there was a striking increase in the number of secondary schools, and the government was compelled to take action on the training of teachers for these schools. However, it was in 1908 that the government issued its first Regulations (BoE, 1908) relating to teacher training for secondary schools and recognised a limited number of institutions for training students with degrees or equivalent qualifications as secondary teachers. In 1908, UDEs accounted for half of the ten institutions which first obtained grants (BoE, 1910: 166). By 1912, twelve institutions received grants from the BoE, of which eight were UDEs and four training colleges (BoE, 1913: 127). Before the First World War, there was a paucity of provision for secondary teacher training (see Appendix 3.5).

As time went on, the thought that three years were not enough for training teachers became prevalent among the universities. Eventually, in July 1911, the government made grants available in aid of professional training in universities, thereby enabling UDEs to provide four-year courses, of which three years were for degree studies and a fourth year for professional education (BoE, 1925: 20). The possession of a university degree, subsequently, became a requirement for attendance at one of these UDEs. Further, grants were provided to students who signed a ‘pledge’ promising to teach after qualifying. Although some two-year elementary courses in the universities survived until 1951, most died out during the 1920s (Lawson, 1965: 18; Brock, 1978:

223). The four-year course system became the norm after 1921 in universities (Curtis and Boulton, 1967: 376).

In terms of HILs, the training colleges and UDEs, instituted during the early era governments, are important in that the institutions and courses of initial teacher training since the post-war period developed on the basis of these training colleges and UDEs. As we shall see in the subsequent sections, the training colleges were renamed colleges of education in the 1960s and the two-year certificate courses provided by the colleges were replaced with the three-year certificate courses from 1960; the four-year BEd courses became a single provision from 1980. The four-year course system, instituted by UDEs in the early era governments, came to an end in 1951, but this system acted as an early form of the PGCE⁷. After 1951, graduate students intending to enter the teaching profession had to apply for a one-year course of training to a UDE or to one of the institutions providing a post-graduate training course. In addition, it is important to note that the early era governments, since the time of CPCE in the 1840s, instituted their central control over teacher education by exerting power through examining, finance, manpower planning, and prescribing the length and structure of courses in these early training institutions.

⁷ Postgraduate Certificate in Education.

3.2. Policies in the Post-War Era Governments

3.2.1. Institutes of Education: Area Training Organisations

McNair Report (1944)

As noted, the Joint Board system was introduced to bring about closer relations between the training colleges and the universities. However, there was little progress in the relationship between them, except for cooperation through the examination boards. After the outbreak of war in 1939, there were no further changes in teacher education for the time being. It was through the McNair Committee⁸ that the training of teachers began to be comprehensively addressed by the government. In 1944, three months before the 1944 Act received the royal assent, the committee made historically significant recommendations through its report (BoE, 1944b) on aspects of the training of teachers and on reforms of the educational system such as the raising of the school leaving age, the expansion of nursery education, a reduction in the size of classes, the ranking of all forms of post-primary schooling as secondary, and the introduction of compulsory part-time education beyond the school leaving age.

However, as far as teacher education is concerned, most significant were the two split proposals on the institutions responsible for the education and training of teachers, which were known as scheme A for ‘university schools of education’ and scheme B for ‘the joint board scheme’, respectively. One half of the ten committee members proposed that the responsibility for teacher training in England and Wales should lie with the universities, along with the following recommendations (BoE, 1944b: 54): each university should establish a ‘school of education’, it being understood that some universities may find it desirable to establish more than one school; the school of education should consist of an organic federation of approved training institutions working in cooperation with other approved educational institutions; and the school should be responsible for the training and the assessment of the work of all students

⁸ The terms of reference of the McNair Committee, named after its chairman, Sir Arnold McNair, was ‘to investigate the present sources of supply and the methods of recruitment and training of teachers and youth leaders and to report what principles should guide the Board in these matters in the future’ (BoE, 1944b: 5).

seeking to be recognised by the BoE as qualified teachers. The other half of the committee proposed that the responsibility should be shouldered by the revised Joint Board system. Their main recommendation in the report was that the reconstituted Joint Board ‘should become responsible for the organization of an area training service in which there will be a university training department and training colleges preserving their identity and being in direct relation with the Board of Education and the Central Training Council’ (BoE, 1944b: 62).

Institutes of education as ATOs

The McNair Report was followed by a period of inconclusive discussion among the universities, and the majority of universities decided to adopt scheme A, which involved a major constitutional change. The core of scheme A lies in the establishment of schools of education or ‘institutes of education’, as they were afterwards named. By 1951, sixteen institutes of education had been established, most of which were modified versions of scheme A (Patrick, 1986: 251). The number of institutes of education increased to twenty-three (one in Wales) by 1975, of which all but the Cambridge Institute of Education were integral parts of their universities (Dent, 1982: 168; Turner, 1990: 44). The institutes of education were officially recognised as the ‘area training organizations’⁹ (ATOs), empowered to validate the training college courses.

The creation and operation of the ATOs can be understood in the context of the post-war partnership strategy. The McNair Committee acknowledged the need for an integrated training service, but it was opposed to creating a single national training service directly controlled by a central authority. Instead, it proposed to ‘create a system in which real responsibility is borne by the constituent parts, each possessing authority sufficient for the tasks it has to perform’ (BoE, 1944b: 49). In the system, the universities were expected to ‘accept responsibility for the general supervision of the training of teachers’ and to ‘have the active partnership of those already engaged in the work and of others who ought to be engaged in it’ (BoE, 1944b: 50). Under the post-war partnership strategy, the ATO was representative of all the bodies in the area

⁹ Only two of the new organisations adopted the term ‘school of education’, proposed by the McNair Report, and the majority used the term ‘institute of education (sometimes, ‘delegacy’ for the training of teachers). However, the MoE used a neutral title of ‘area training organizations’ to describe all these bodies (Turner, 1990: 43).

concerned with the education and training of teachers such as the university, the recognised training establishments, the LEAs, and the teachers. The five principal functions of the ATOs were to:

- Supervise the course of training in member colleges and to further their work in every possible way.
- Recommend to the Ministry the status of qualified teacher students who had successfully followed courses of training in member institutions including university departments of education.
- Plan the development of training facilities in the area.
- Provide an education centre for students in training, for teachers serving in the area and for others interested.
- Provide facilities for further study and refresher courses for those who were already qualified teachers.

(MoE, 1949: 55-56)

The governance of an institute of education at this time, mainly based on the suggestions in the McNair Report, was illustrated as follows (Curtis and Boutwood, 1967: 380-381): the governing body is the 'board' of the institute composed of representatives of the university, the training colleges and member institutions, and the LEAs; the 'professional committee' carries out the actual day-to-day business and the various 'boards of studies' discuss the syllabuses of instruction provided by the different training colleges; under the board and the professional committee, there are usually a number of sub-committees to address such matters as lectures and courses, the library, research apparatus, and school textbooks; the teaching profession is represented on the board, and the professional committee and two assessors, having no vote, are appointed by the MoE to contribute to the discussions; most institutes publish a bulletin containing contemporary issues and a quarterly journal addressing research articles.

3.2.2. Emergency Training Scheme

Educational reconstruction and teacher shortages

The Second World War brought far-reaching ravages to schooling during the war period: school work was seriously interrupted by raids and evacuations, a large number of schools were destroyed or were taken over for military use, many teachers left schools for various forms of wartime service, and there was a substantial decrease in the number of entrants to the teaching profession. Under the wartime coalition government of Winston Churchill, the urgency of extensive reform in the educational field was expressed by the 1943 White Paper (BoE, 1943a), putting an emphasis on issues such as the extended provision of nursery education, the lengthening of school life for all children, a decrease in the size of classes, and the expansion of the youth service and of teacher training. Most recommendations in the paper were incorporated into the new Educational Bill, which later became the 1944 Act. During planning for the bill, much attention was drawn to the likely shortage of teachers immediately after the war, which might be furthered by the raising of the school leaving age to 15 and the reducing of class sizes.

To address the question of teacher shortage, the government announced in February 1943 plans for the rapid demobilisation of teachers after the war, and at the same time lowered the minimum age of women entrants to training colleges from 18 to 17 years 6 months and, in the case of domestic science colleges, to 17 years 3 months (Crook, 1997: 381). However, as a result of the depression years of the 1920s and 1930s, the seventeen-eighteen age groups eligible for entrance to the colleges were diminishing in number and other work was more attractive for them. Under this situation, the option available for the government was thought to be to recruit mature men and women serving in the armed services through launching an emergency training scheme.

To provide details of the emergency training scheme, the government issued Circular 1652 (BoE, 1944a), based on a report worked out in 1944 by a committee of HMIs, teachers and LEA officials (MoE, 1948b: 42). Under the circular, the emergency training course consisted of forty-eight weeks excluding four weeks of vacation, that is, a preparatory stage of six weeks, two main courses amounting to thirty weeks and

two periods of teaching practice totalling twelve weeks. At the end, the students were to be assessed on their overall performance whereby they could be passed, failed or referred for more training; the first two years of actual service were to be probationary and to include a course of part-time study. The scheme was to be financed by the Treasury and the students were given free tuition and maintenance grants.

Emergency training scheme from 1945 to 1951

The scheme was started in 1945 and closed in 1951. By the end of 1947, some fifty-five day and residential emergency colleges were in operation, using provisional and humble premises including a castle, country mansions, former industrial hostels and hutted hospitals; Ellen Wilkinson, Minister of Education under the Attlee Labour government, was ‘overwhelmed with abuse from all sides’ (Dent, 1954: 7). However, during the period of its existence, more than 35,000 certificated teachers emerged from the emergency centres, which helped ease the urgent demand for the 40,000 teachers needed to replace the ravages of the war itself and to provide for the raising of the school leaving age to 15 (Gosden, 1972: 285, 289). The number of full-time teachers employed in maintained and assisted primary and secondary schools (other than special schools) increased from 187,500 in 1947 to 217,500 in 1951 (MoE, 1951a: 43), and the certificated teachers under the emergency scheme accounted, by 1951, for about 16 per cent of the teachers serving in these primary and secondary schools.

The majority of candidates accepted for training under the emergency scheme had had just some secondary education (see Appendix 3.6). It was stated in the circular above that ‘these candidates shall not be regarded by their professional brethren and by their future employers as an inferior kind of teacher’ and that ‘we want them to be eligible for promotion to headships and other positions of responsibility, in spite of their concentrated training, and in some instances their lack of academic certificates’ (BoE, 1944a: para. 21). The scheme was given positive evaluations by some contemporary literature (Lewis, 1946; Martin, 1949; MoE, 1950). However, the emergency scheme was in stark contrast to the McNair Committee’s support for three-year training courses. In this regard, critics at that time such as Sir Ernest Graham-Little, MP, of London University, criticised the scheme for having diluted the teaching profession (Crook, 1997: 383).

2.2.3. Three-year certificate course

Towards the three-year course

There was an argument that the two-year course in training colleges should be lengthened to three years. In 1919, the Committee of Principals in Training Colleges first recommended the introduction of a three-year course in the training colleges, and a minimum period of three years for the training of non-graduate teachers had been a longstanding argument of the National Union of Teachers (NUT). In addition, the McNair Committee strongly supported the introduction of the three-year course with a recommendation that ‘the normal period of education and training provided by area training authorities for those entering upon preparation for the teaching profession at about 18 years of age should be three years’ (BoE, 1944b: 65-66). However, socio-economic situations between the 1940s and the mid-1950s prevented the government from introducing the three-year course.

During the 1940s, there was a first post-war bulge in the number of live births (see Figure 2.1), which consequently led to an increasing number of children in the schools. This growing school population, together with the raising of the school-leaving age in 1947, contributed to teacher shortages between 1946 and 1954. Since the mid-1950s, however, the problem of teacher shortages began to improve. For one thing, the number of students admitted to teacher training courses increased from 1956-57 on a large scale (see Appendix 3.7). In addition, the number of live births reached a peak in 1947 and fell almost consistently until 1955 (see Figure 2.1). Most importantly, this situation improved from 1955, thanks to ‘buoyant recruitment, later retirement, and the continued willingness of married women to remain in or return to teaching’ (Dent, 1977: 134).

Three-year course from 1960

With this decreasing pressure from teacher shortages, the Association of Teachers in Colleges and Departments of Education (ATCDE) demanded in 1954 that a date for the introduction of the three-year course be fixed. In this situation, the National Advisory Council on the Training and Supply of Teachers (NACTST), founded in 1949 to provide the Minister of Education with the means of obtaining advice on national policy relating to the training, qualification, recruitment and the distribution

of teachers (MoE, 1951b: 3), gave advice through its fifth report (MoE, 1956a) to the Minister of Education, Anthony Eden, that the three-year course should be introduced everywhere simultaneously between 1959 and 1960.

Three reasons, which had already been provided by the McNair Report of 1944, for introducing the three-year course were regarded as still holding good by the fifth report of the NACTST (MoE, 1956a: 4-5). They were as follows (BoE, 1944b: 65): the schools needed better educated men and women, and this better education could not be ensured unless students were released from the strain and sense of urgency which affected many of them at the time; students in general had not, by the time they were twenty, reached a maturity equal to the responsibility of educating children and young people; and the McNair Committee intended that a longer amount of time should be used in contact with, and teaching in, the schools.

Since the McNair Report, successive governments expressed support for an additional year's training for teachers when the supply position eased. Now that the question of teacher supply seemed to have eased, there was no excuse for the government to postpone the introduction of the three-year course. Viscount Hailsham, Minister of Education under the Macmillan government, made an announcement on 6 June 1957 in the House of Lords that from September 1960 the normal training college course would be extended over three years (Curtis and Boulton, 1967: 383; Dent, 1977: 135). For many years the introduction of the three-year course in the training colleges had been desired by many teachers, administrators, and HMIs. However, the driving force leading to the introduction was fear of unemployment among teachers. It appeared explicitly in the fifth report as follows:

Without introduction of the three year course or some other equivalent restriction of recruitment (and without some major new source of demand for teachers), it is not impossible that there may be some difficulty in the early 1960s, as there has never been in the 1950s, in maintaining full employment in the teaching profession.

(MoE, 1956a: 11)

With regard to how this extra year should be spent profitably, opinions were divided, and also related to time-honoured issues on the emphasis in teacher training: personal education versus professional training and theory versus practice. However, as time went on, there was a general agreement, although not totally united, on the total amount of time to be given to school practice: ‘it should be proportionately not more than was given in the two-year course, and possibly rather less: that, is, not more than 90 days, but not fewer than 60’ (Dent, 1977: 138). In the development of teacher training institutions, the three-year certificate course, run until the 1970s, is significant in that it provided a basis on which the training colleges could make their status more equivalent to that of universities. As we shall see in the following section, the three-year course was followed from 1964 by the four-year course leading to the Bachelor of Education (BEd) degree.

3.2.4. Colleges of education and polytechnics

Robbins Report (1963): colleges of education and BEd

In 1961, five months after the three-year course began, the Prime Minister, Harold Macmillan, appointed a Committee on Higher Education (CHE) chaired by professor Lord Robbins, with the terms of reference to review ‘the pattern of full-time higher education in Great Britain’ (CHE, 1963: 1). In October 1963, the Robbins Committee duly published its report with five appendices and, although training colleges were not represented on the committee, the report contained important recommendations on teacher education, together with other recommendations on higher education.

The appointment of the committee reflects the Keynesian intervention strategy responding to changing socio-economic situations at this time. As seen in Figure 2.2, the 1950s was an age of affluence in Britain, and the British economy was still in the phase of expansion in the first half of the 1960s, with an average unemployment rate remaining below 3 per cent. In addition, following the first post-war bulge in the 1940s, there was a second post-war bulge from the mid-1950s (see Figure 2.1). In line with economic affluence and growing live births, there was growing pressure from the post-war generation of school leavers for access to higher education. In this situation, the government felt the need to prepare a long-term plan for expanding

higher education, so consequently commissioned the Robbins Committee to investigate ‘the probable demand for higher education in Great Britain up to 1980 and the extent to which it should be met’ (CHE, 1963: 2-3).

The committee recommended the expansion of higher education with a projection that by 1980/81 there should be 558,000 full-time places in Great Britain, of which 346,000 should be in universities, 145,000 in colleges of education, and 65,000 in further education (CHE, 1963: 152-158). Furthermore, the committee reviewed the education and training of teachers in training colleges and made some recommendations including the raising of the average of size of training colleges, the introduction of a four-year course leading to a BEd degree, the change of the title of training colleges into ‘colleges of education’ – having independent governing bodies and earmarked grants – and the establishment of ‘schools of education’. Among these recommendations, those concerning the schools of education and the BEd degree are most significant in respect of the institutional development of teacher education in England.

As we can see from the Joint Board system and the institutes of education, the government pursued policies aiming to link the training colleges with the universities as a way of raising the status of the colleges. However, the committee thought that the links between training colleges and universities was not as beneficial to the colleges as might have been hoped. It was noted in the report that the training colleges felt themselves to be ‘only doubtfully recognised as part of the system of higher education’ (CHE, 1963: 107). Accordingly, the committee thought the solution to this problem was to make the training colleges ‘go forward in closer association with the universities not only on the academic but also on the administrative side’ (CHE, 1963: 119). To do this, it emphasised the need to return to the McNair Report’s original concept of scheme A, and recommended that:

The colleges in each university’s Institute of Education and the University Department of Education should be formed into a School of Education... On the academic side, each school should be responsible to the university senate for the degree awarded to students in Colleges of Education. Each School of Education should have its own academic board and boards of studies.

The government immediately welcomed closer links between universities and training colleges, henceforth to be called colleges of education; the intention being to emphasise the importance of education in the preparation of teachers. However, faced with pressure from local authorities¹⁰ eager to maintain their position in teacher training, the government did not accept the idea of administrative and financial integration and independent governing bodies for the colleges, making no significant change in the existing governance of the ATOs. Nonetheless, the government did accept the recommendation to introduce the BEd. The committee recommended the colleges of education should introduce a four-year course leading both to a degree and a professional qualification for suitable students, leaving the existing three-year certificate course continuing to be available (CHE, 1963: 279).

It was stated in the report that there was a general agreement within the teaching profession that ‘teaching should become an all-graduate profession’ (CHE, 1963: 112). It is worth noting that, prior to the report, students who completed a three-year course in training colleges were awarded just a university certificate through the institute of education to which the college belonged, without a university degree. In this sense, the introduction of the BEd can be understood as a progressive step towards the professionalisation of teaching. It was also indicated in the report that a four-year course for awarding a BEd, instead of a three-year one, was chosen in consideration of equity between graduates with a certificate from training colleges and from university departments of education (CHE, 1963: 114).

After the publication of the report, there were discussions between universities and colleges about the degree. The BEd course was introduced in 1964 but, at first, over half the universities with the institute of education refused to undertake the responsibility of validating such a degree. It was not until 1968 that each of the twenty-one universities agreed to award BEd degrees, but only seven were prepared to offer classified honours degrees; the first BEd degrees were awarded in 1968 by the five universities of Keele, Leeds, Reading, Sheffield and Sussex, and, in the

¹⁰ In 1962/63, there were 186 training establishments, of which 110 were maintained by LEAs, 49 by voluntary bodies and 27 by universities (MoE, 1963d: 90)

following year, awards were available in all universities (Dent, 1977: 144). As we shall see in the following section, this four-year concurrent BEd course was revised in 1973 into the post-James consecutive and concurrent BEd. By 1972, the number of candidates for a fourth year accounted for only 10 per cent of the number of third year students, which was far from the 25 per cent of the Robbins Committee's assumed provision by the mid-1970s, mainly because of both 'the relatively high entry qualifications imposed by both universities and colleges' and 'the anomalies in the BEd structure' (Dent, 1977: 145).

The Robbins Committee's hope of freeing colleges from local authority control and linking them with the universities was not achieved immediately through following the recommended pattern. However, as Taylor (1988: 49) points out, the committee's recommendations had much significance 'in placing the colleges squarely within the orbit of higher education, in providing the basis from which teaching could eventually become a graduate profession, and in identifying the issues of real substance that would need to be confronted in the further development of the field'. The committee's recommendations were followed by the Weaver Report on the government of colleges of education. This report was published with the intention of 'enabl[ing] the colleges to take full academic responsibility and to exercise it in an atmosphere of freedom unhindered by unnecessary restrictions' (DES, 1966a: 3). As a result, the college government from 1966 onwards was greatly liberalised.

Following the McNair Report and the establishment of ATOs, some central controls were devolved to universities. The Robbins Report was followed by more substantial devolution: central government's responsibilities for policy and planning in academic, administrative and financial realms were devolved to such bodies as the Universities Council for the Education of Teachers (UCET), the Council for National Academic Awards (CNAA), the Advisory Committee on the Supply and Education of Teachers (ACSET) and the University Grants Committee (UGC). The roles of these agencies grew throughout the 1960s and 1970s together with an increasing number of students in training and the requirement for compulsory certification for graduates intending to teach.

Polytechnics and the CNA as a validating body

The 'binary' policy can be traced back to 1965 when the Secretary of State for Education and Science, Anthony Crosland, announced at the Woolwich Polytechnic that the government intended to pursue a 'binary' policy in higher education. In his speech, he asserted that higher education should be based on 'the twin traditions' of institutions of the 'autonomous sector', represented by the universities, and those of the 'public sector', represented by the leading technical colleges and colleges of education (Crosland, 1965). Crosland's stated reasons for the choice of the binary system were as follows (Pratt, 1997: 8): the increasing need for vocational, professional and industrial-based courses could not be met by the universities; a perception that a system based on a 'ladder' concept would lead to demoralisation in the public sector; it was felt desirable that part of higher education remained under 'social control' and was responsive to society's needs; and Britain could not withstand foreign competition by downgrading the non-university professional and technical sector. In the binary system, according to Crosland's ideas, all institutions of higher education could have equal status, with just functional differences.

The Wilson government did not hesitate to implement the binary system. In 1966, the government published a White Paper (DES, 1966c), proposing that a new type of HE institution, the 'polytechnic', would be created, although this term was not new at all as it was already being used by a number of existing institutions. It was stated in the paper that 'the Secretary of State will designate a limited number of Polytechnics as the main centres for the future development of full-time higher education within the Further Education System' (DES, 1966c: 9). In the paper, twenty-eight (later thirty) polytechnics were set out to be established. These polytechnics were steadily designated from 1968 to 1973. They were formed from 'over 50 existing technical and other colleges in 31 local authorities' and, in 1973, there were 'over 150,000 students, of whom almost exactly half were studying full time and half part time' (Pratt, 1997: 3).

This policy stream of the binary system was substantially opposed to the previous one established by the McNair and Robbins Reports, which saw the universities as central to higher education and emphasised the strong linkage between the colleges of education and the universities. Nevertheless, this policy stream was also established

on the basis of the Keynesian intervention strategy. In its first ‘national plan’ (DEA, 1965c: 198) the government already made clear its intention that in 1969/70 there should be available in Great Britain places for over 70,000 full-time and sandwich students following advanced courses in institutions of further education, which was far above the estimate of 51,000 by 1973/74 projected in the Robbins Report.

It is also worth noting that these polytechnics were validated by the CNAAB. This council was established in 1964 under royal charter as a degree-awarding body for non-university institutions in Great Britain, on the basis of the Robbins Committee’s recommendations. The committee recommended the replacement of the National Council for Technological Awards with the CNAAB, which would consist of representatives of the universities (including technological universities), the regional and area colleges and industry, and award honours and pass degrees to students in these colleges outside the universities and colleges of education (CHE, 1963: 142-144). As with the ATOs, the establishment and operation of the CNAAB reflects the nature of the post-war partnership strategy in that the government allowed it to be run by representatives of the stakeholders concerned, without exerting any form of central control. In the second half of the 1960s, the polytechnics began to provide students with teacher training places through their departments of education, and the CNAAB began validating BEd degrees in 1972 (DES, 1973a: 4).

3.2.5. Revision of the BEd course in the 1970s

Growing criticisms of the teacher education system

The provision of teacher education was consistently expanded until 1972 (see Appendix 3.8), with five main types of teacher training establishment in England and Wales before August 1975: UDEs, colleges of education, polytechnic departments of education, art training centres and colleges of education (technical). The main training courses existing during the 1960s and 1970s were the three/four-year courses, BA/BSc courses, PGCE courses, and other specialist courses. As discussed, the three-year certificate course was lengthened in 1960 from the two-year certificate course, and the three-year course was joined in 1964 by the BEd following the proposals of Robbins Report. The three/four-year courses also included a small number of

concurrent BA/BSc courses which ‘incorporated undergraduate study of education and a specialist subject, or combined studies with a certificate in education and provided the flexibility, not available in the BEd, of enabling the student to choose at an appropriate point whether to make his degree also a teaching qualification’ (Alexander, 1984: 104).

The PGCE was a one-year course for graduates with a degree. Initially, it was provided by the UDEs and played a role in providing a much higher proportion of grammar or secondary school teachers, even though they were designed to supply teachers for elementary or primary education. In the 1950s, the training colleges began to supply a substantial number of secondary teachers, but even then ‘college trained secondary teachers tended to find jobs in secondary modern schools, while university trained secondary teachers staffed the grammar schools’ (Patrick and Reid, 1980: 7). During the 1960s, however, there appeared a number of PGCE courses provided by the colleges of education, and the public sector institutions increased their share in the PGCE to 50 per cent of the number of admissions in 1974. Additionally, the CNAA started to validate PGCE courses from the West Midlands College of Higher Education and North East London Polytechnic in 1974 (Smith, 1980b: 17). Specialist courses led to various specialist certificates and diplomas for art and further education teachers working in art colleges, colleges of education (technical/FE) and elsewhere.

Of these four kinds of training courses, the three/four-year courses accounted for the majority of the number of students admitted to initial teacher training and were largely provided by the colleges of education (see Appendix 3.8). With the extension of the course to three years and the establishment of the BEd, as Bell (1981: 10) points out, the holistic curriculum of the training college was replaced with a ‘differentiated curriculum’ with strong boundaries between education theory (internally divided into disciplines), professional courses in methods of teaching, and the main subject. This differentiated curriculum, emphasising the main subject study and education theory, made the course more academic, which led to the criticism that the course ‘failed to provide the student with the basic professional equipment for coping in the classroom’ (Alexander, 1984: 108). Furthermore, the colleges were beginning to receive criticism from the schools, in comprehensive reorganisation process at this time, and from the

general public. In particular, Black Paper critics criticised not only schools and teachers, but also the initial training courses for their theoretical aspects (Gosden, 1990: 75).

James Report (1972) and the new three/four-year BEd courses

The change of government in 1970 provided the momentum to respond to these growing criticisms of the teacher education system. The new Secretary of State, Margaret Thatcher, spent little time in appointing a special committee, chaired by Lord James of Rusholme, with comprehensive terms of reference ‘to enquire into the present arrangement for the education, training and probation of teachers in England and Wales’ (DES, 1972a: iii). The James Committee was asked to begin its work in early 1971 and to report within twelve months. The committee duly presented its report in December 1971. The James Report was the first report in the post-war era which addressed each aspect of teacher education as a single theme, with 133 recommendations advocating the necessity of a life-long education for the teacher. It divided the education of teachers into three cycles (DES, 1972a: 107-116):

- The first cycle should consist of personal education of the student, either two years of academic study leading to a Diploma in Higher Education (DipHE), or a three-year degree.
- The second should consist of pre-service training and induction, which would cover two years: the first year would be undertaken in a professional institution and the second in the school as a ‘licensed teacher’; successful completion of this cycle would lead to the award of ‘registered teacher’ status and a BA(Ed) degree.
- The third should consist of in-service education and training for the rest of the registered teacher’s career; each teacher should be entitled to one term on full pay for every seven years they were employed.

The James Report also reflects the two long-standing issues of teacher education in England, i.e. consecutive versus concurrent and academic versus professional studies. As discussed, Robbins proposed a four-year BEd to be comparable in standing and function to existing university degrees, and to treat academic and education studies concurrently. In contrast, the James Committee recommended the replacement of the

BEd with a two-year DipHE plus BA(Ed), which was clearly consecutive. To do this, the committee also recommended that the existing university-based ATOs should be abolished, believing that ‘the colleges have grown up and should be encouraged to move forward to a new degree of independence’ (DES, 1972a: 49). Instead, it recommended the establishment of two new bodies to take responsibility for the recognition of all professional teaching qualifications and for making recommendations on the planning of the teacher education system: Regional Councils for Colleges and Departments of Education (RCCDEs) – empowered to remit the academic/awarding function in respect of some or all of their colleges to the CNAA or constituent universities – and a National Council for Teacher Education and Training (NCTET) – empowered to award the DipHE, the BA(Ed) and the MA(Ed) (DES, 1972a: 114-115).

In December 1972, the James Report was followed by a White Paper (DES, 1972b) outlining the government’s response to the James Committee’s recommendations. In the paper, the Conservative government did not accept the second cycle degree of BA(Ed) in the face of growing support for ‘concurrent courses for those wishing to commit themselves to teaching at an early stage’ (DES, 1972b: 21). Instead, the government suggested new three-year courses which would lead to an ordinary BEd degree and qualified status, and also allow a proportion of students in these three-year courses to continue for a fourth year to take an honours BEd degree. The government accepted the recommendation of the introduction of the two-year DipHE, and envisaged that the two-year DipHE might well be incorporated into the new three-year ordinary/four-year honours BEd courses (DES, 1972b: 22). This was a compromise between the concurrent and consecutive structure in that the government ‘allowed for 3+1, 2+2 or 4+0 variants (though tending to prefer 2+2), and encouraged the notion of BEd/DipHE/BA/BSc flexibility’ (Alexander, 1984: 111). The existing three-year certificate course was also continued for the time being as there would not in the short term be enough applicants who could meet the entrance qualification of two or more A-levels proposed for both the BEd and DipHE courses (DES, 1972b: 22).

As with the ATOs, the concept of the post-war partnership was still seen in the governance of the RCCDEs and NCTET. The James Committee recommended that

‘each RCCDE should bring into partnership all the colleges, universities, polytechnics and LEAs in its region, together with representatives of teachers, the Open University and the CNAA, nominees of the Secretary of State and DES assessors’ and ‘the NCTET should consist of about 20 members, selected by the Secretary of State from among those nominated by the RCCDEs’ (DES, 1972a: 114). The government acknowledged the need to replace the existing university-based ATOs with new regional committees to coordinate the education and training of teachers. In consideration of the difficulty in demarcating suitable regions, it also hoped that for the time being the ATOs would ‘continue to discharge their existing responsibilities for both initial and in-service training’ (DES, 1972b: 27). The government did not accept the establishment of NCTET. Instead, the government intended to establish an Advisory Committee on the Supply and Training of Teachers (ACSTT).

3.3. Policies in the Thatcherite Governments

3.3.1. IHLs

Reorganisation process: colleges of higher education and local committees

The institutional structure of teacher education changed markedly from the mid-1970s. As a result of the binary policy, the colleges of education, to some degree, straddled the university and non-university sectors. Their positioning, however, was made clear by the 1972 White Paper focusing on the integration of teacher education with the rest of higher education. The government intended that ‘some colleges either singly or jointly should develop over the period into major institutions of higher education concentrating on the arts and human sciences’ (DES, 1972b: 44). More importantly, the government envisaged that many of the 160 colleges which were comparatively small and inconveniently located for this development would face the following situations:

Some of these will continue to be needed exclusively for purposed of teacher education with increasing emphasis on in-service rather than initial training. Some may seek greater strength by reciprocal arrangements with the Open University... Others may find a place in the expansion of teachers’ and professional centres. Some must face the possibility that in due course they will have to be converted to new purposes; some may need to close.

(DES, 1972b: 44)

In March 1973, the government issued Circular 7/73 (DES, 1973b), which required LEAs to quickly submit their final plans for the reorganisation of higher education after the new local authorities, established under the Local Government Act 1972, took over on 1 April 1974. This reorganisation policy eventually led to the colleges of education becoming no longer monotechnic but integrated into the public sector of higher education with the new terminology of ‘colleges or institutes of higher education’. Circular 5/75 clearly stated that ‘outside the universities, teacher education and higher and further education should be assimilated into a common

system' (DES, 1975a: para. 2). The Further Education Regulations 1975 formally integrated the colleges of education into the public sector of higher education. These regulations were significant in that they revoked the Training of Teachers Regulations 1967, thereby ending the existing provisions for the overall supervision of teacher training through ATOs, the management of maintained and voluntary training institutions and student grants. With the new regulations, the ATOs were de facto abolished in 1975 (Lynch, 1979: 139). Instead, local professional committees were set up, as an interim measure, to undertake the previous ATOs' role of making recommendations on the professional approval of ITT courses, and the academic award for polytechnics and colleges of higher education became the remit of the CNAA.

Socio-economic situations at this time were influential factors exerting a strong effect on the process of the teacher education sector reorganisation implemented between 1974 and 1982. Under the Keynesian intervention strategy, the government estimated the total stock of teachers required by 1981, based on the demographic data available, in order to meet the needs of a 10 per cent improvement in pupil/teacher ratios and the implementation of the James proposals on in-service training. As a result, it was suggested that the total teaching force by 1981 should be 510,000 (1972b: 43). Naturally, every discussion on the reorganisation of teacher education in the public sector was based on this estimation. However, it was proved that the government had substantially overestimated actual births. From the mid-1960s there had been a steep decrease in the number of live births in England and Wales (see Figure 2.1). Furthermore, economic difficulties at this time (see section 2.2.2) acted as another factor, forcing the government to reduce the proportion of public expenditure for education, which eventually led to a reduction in the total stock of teachers.

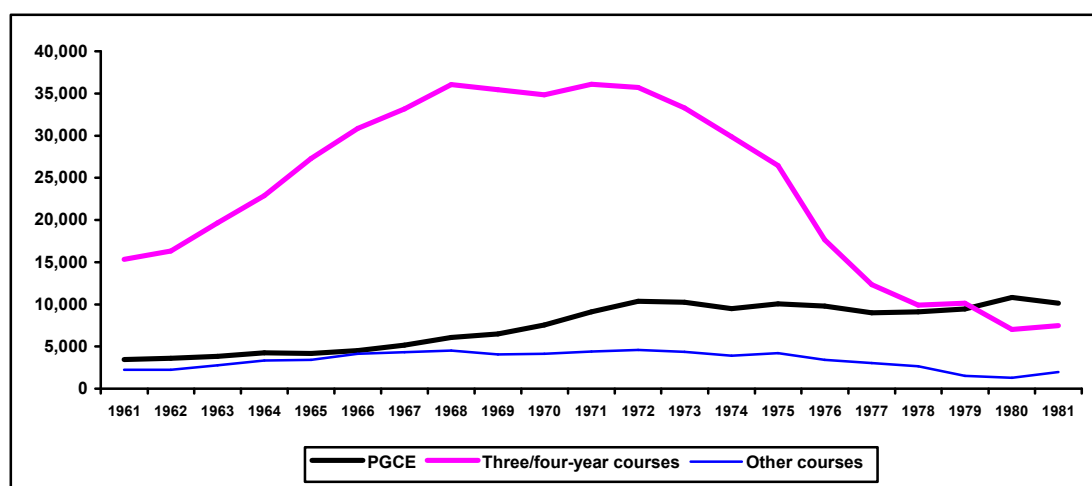
By the end of 1975, out of about 150 colleges, '13 colleges faced closure, 40 were merged with polytechnics, 6 would go to universities (to offer BEDs in a university context), 60 were to merge with each other or further education colleges to become "hybrid" institutions and 30 remained as they were' (Cortis, 1985: 19). The DES repeatedly revised downwards the number of teacher training places that would be required, along with its estimate of the school population in the coming years. In January 1977, a new target for teacher training places in the 1980s was announced as

45,000, of which 10,000 would be for induction and in-service training and 5,000 for graduates (Dent, 1982: 170). This meant that more colleges of education would have to be closed or merged with other establishments than had been previously envisaged. Shirley Williams, the Secretary of State for Education, announced a list of twenty-two institutions, in addition to the eighteen previously determined that should be closed, and seven mergers. As a result of the subsequent consultations, in June 1977, the final figure for teacher training places was set at 46,000 and some threatened institutions were reprieved.

The growth of the PGCE and the BEd only at undergraduate level

Historically, the PGCE made its appearance within universities along with the advent of the day training colleges in the 1890s. The number of graduates training in UDEs fell after the abolition of the ‘pledge’ in 1956, but the PGCE succeeded in maintaining its minority position in teacher training, largely due to the increase in the number of state scholarships for university places. Additionally, training became compulsory for graduates intending to teach in maintained primary and secondary schools by 1969 and 1973 respectively, with the exception of certain shortage subjects. As Figure 3.2 shows, during the 1960s and 1970s, the PGCE grew steadily from its minority position, even while the admissions to the BEd were falling by several thousands in the period of the reorganisation, broadening its focus to encompass all kinds of school and teaching situations. In 1980, PGCE admissions, for the first time, outnumbered those of the three/four-year courses by 10,830 to 7,017.

Figure 3.2. Students admitted to courses of ITT in England and Wales, 1963-1981



Source: DES (1972c: 2; 1978f: 3), Alexander et al. (1984: xvii)

Until the mid-1970s, the main concern had been with the colleges and the content of their courses, with little attention paid to the PGCE because of its small scale and less pressure from the challenge of slow learners facing its college-trained contemporaries (Alexander, 1984: 118). The growth of the PGCE was of importance in the policy process in that it now lay at the centre of policy debates on teacher education along with BEd courses. In 1980, the Thatcher government began to survey public sector PGCE courses (DES, 1980a), and the UCET produced two consultative reports respectively on secondary and primary PGCEs (UCET, 1979; 1982).

In addition to the growth of the PGCE during the reorganisation period, another significant policy in terms of IILs was to make the teaching profession fully-graduate. In 1977, the Callaghan government intended that ‘there should be as soon as possible a graduate entry into the teaching profession’ and that ‘from 1979 or 1980 the entry to the existing certificate courses should be phased out’ (DES, 1977c: 26). In the following year, the government made real its intention by issuing Circular 9/78 (DES, 1978a) whereby it was made mandatory for all undergraduates entering from 1980/81, except for a small number of applicants for BA or BSc with QTS (qualified teacher status) courses, to take a three-year or four-year course leading to the BEd only, with the one-year courses for persons holding specialist qualifications in business studies, craft, design and technology, and music, continuing exceptionally until 1983/84, in order to safeguard the supply of teachers in these shortage subjects.

3.3.2. CATE and teacher education under growing control

From quantity to quality

Following the reorganisation of teacher training institutions and Callaghan’s speech at Ruskin College in 1976, as Taylor (1984: 29) points out, the main concern of national discussion on teacher education began to shift from ‘questions of numbers and supply’ towards the ‘content and organisation of courses’ and the ‘criteria on which professional recognition should be given’. That is, the content and quality of teacher education courses, their conduct and the criteria for their approval came into the main sphere of teacher education policies alongside more centralisation. The Thatcher government’s concern with teaching quality began with a range of DES and HMI

publications (DES, 1982a; 1982b; 1982c; 1983a). In 1983, the government published a White Paper (DES, 1983b) that set out proposals to establish new criteria for the accreditation of initial teacher training courses. Concerning the criteria, the government recommended that:

The criteria should relate to the initial selection of students, the level and amount of subject content of courses, professional content, and links between training institutions and schools and should reflect the complexities of the educational system.

(DES, 1983b: 35)

The government embodied its proposals by issuing Circular 3/84, whereby the Council for the Accreditation of Teacher Education (CATE) was established as a quango to 'advise the Secretaries of State for Education and Science and for Wales on the approval of initial teacher training courses in England and Wales' (DES, 1984a: para. 3). This circular is significant in that it clearly shows the Thatcher government's raising central control strategy in teacher education. As Furlong et al. (2000: 22) state, it is this circular that for the first time 'established the right of the Secretary of State to have a say in the detailed content and structure of initial teacher education in England, thereby marking the end of higher education's (and even the old universities') autonomy'. In autumn 1984, CATE held its first meeting under the chairmanship of William Taylor, Vice-Chancellor of the University of Hull, with a membership 'nominated by the Secretary of State' (Taylor, 1990: 116).

The creation of CATE was in line with an international interest in the content and quality of teacher preparation at this time. During the 1970s there emerged a series of reports on the needs and shortcomings of teacher preparation, which shared many common features in economically advanced countries including the USA, Australia, New Zealand, Canada, and many within Europe (Taylor, 1990: 111). In addition, the establishment of CATE can be understood in the context of debates on institutional arrangements for teacher education in England itself. Following the Further Education Regulations 1975 and Circular 5/75, there appeared a separation between academic validation and professional recognition, which was covered by local professional committees. After nine years, a national agreement on a national teaching council

arrived at the creation of CATE, which would take the responsibility for professional accreditation, with the CNAA and the universities remaining responsible for academic validation. With CATE, the need for ‘a clearer distinction between professional approval and academic validation’, raised by the government (DES, 1983b: 34), was now fully met.

Control by criteria for accreditation

The Thatcher government sought to exert tighter control over teacher education. This was made possible by not only the establishment of CATE itself, but also the setting of the criteria for accreditation. The government laid down the criteria for the approval of courses and established CATE to oversee their imposition. This was ‘a relatively gentle intervention but one which gave the Secretary of State wide indirect powers over the professional formation of teachers’ (Maclure, 1998: 10-11), with CATE declining to accredit as leading to QTS those courses which did not meet the criteria. Accordingly, influential for teacher education staff were the criteria defined by central government. In order to obtain accreditation, courses were required to meet criteria relating to course length, links maintained with schools, the selection and assessment of students, the school teaching experience of staff, and the content of both subject and professional studies (DES, 1984a: Annex). The most contentious among the criteria set out in Circular 3/84 were those concerning ‘the subject backgrounds of students entering one-year postgraduate courses and the subject content of four-year degree courses’ (Whitty et al., 1987: 168). Concerning subject study for the three/four-year BEd, the circular stated:

The higher education and initial teacher training of all intending teachers should include the equivalent of at least two full years’ course time devoted to subject studies at a level appropriate to higher education.

(DES, 1984a: para. 7)

The criterion of ‘the equivalent of at least two full years’ course time’ met with serious opposition owing to its effect on the balance of courses, particularly those designed for the professional education of teachers for primary schools. This opposition is somewhat understandable, given the fact that, prior to the criterion, professional work comprised around two-thirds of course time. Now, the work had to

be reduced to no more than half. In the van of the Undergraduate Primary Teacher Education Conference, several teacher unions and the National Association of Primary Education participated in a campaign against the criterion (Whitty et al., 1987: 169). As for teacher educators, the criterion that staff engaged in teaching pedagogy should have recent, relevant and successful experience in schools, the so-called 'recent and relevant experience' (DES, 1984a: Annex 4), had a rapid and powerful impact on the conditions of their service. Although the original wording in the circular was far from radical or imperative, most staff and institutions tried to accommodate themselves to this criterion and many staff had to go to work in schools with relief from course teaching.

In 1985, CATE began to review individual institutions' courses after a detailed HMI report on their initial teacher training courses became available, highlighting that eight out of the first nine institutions examined failed to meet the requisite criteria (Patrick, 1986: 255). The accreditation procedures at this time included visits from HMI to institutions, HMI reports, the presentation of CATE forms, meetings between staff from institutions and a CATE panel, an evaluative letter from CATE to the Secretary of State and institutions, and the Secretary's decision to grant QTS to course graduates (Barton et al., 1992: 43). In 1985, only half of the courses reviewed obtained positive recommendations from CATE, rising subsequently to two out of three in 1986 and to five out of six in 1987/88 (Taylor, 1990: 120). The main reasons for the rejections in the early stages of the council work, most of which could be rectified by 1989, included deficiencies in the quantity and quality of subject studies, a lack of recent and relevant experience with pedagogy on the part of the staff concerned, weaknesses in local committee arrangements, an inappropriate balance between contact and private study time within the 100 hours of mathematics and language study required for intending primary teachers, and poor coverage of the elements of educational and professional study demanded by the criteria.

Circular 24/89: reconstituted CATE

CATE was scheduled to expire at the end of 1989. However, the Thatcher government chose to reorganise it by issuing Circular 24/89 (DES, 1989b). It has been posited that CATE survived because it succeeded in demonstrating the purpose of the criteria as just certain minimum requirements that any good programme should satisfy, allowing

a great variety of approaches to course design and execution (Taylor, 1990: 122). Its survival can be more easily understood in terms of government strategies. For five years CATE acted well as the government's key institutional agent for raising central control over teacher education, so there was no need to terminate it as planned previously.

Under Circular 24/89, CATE was reorganised as a rather smaller but more administratively supported council, having a larger secretariat with two part-time professional officers, along with extended terms of reference including developmental functions to offer advice to the Secretary on the operation of the criteria and on such other matters as he might propose. More importantly, CATE local committees were established to oversee all teacher training courses, taking over some of the existing reporting groups' work. The constitution of the committees was similar to that of the post-1890 local committees (Reid, 2000: 215), but it also reflected an element of government strategies. The committees were to consist of a range of representatives including those from business and industry, but representatives from higher education institutions involved in teacher education should be in the minority and the chair had to be independent of higher education (Furlong et al., 2000: 23).

With the new CATE, central control over initial teacher education courses became more strengthened, making the criteria more prescriptive in terms of the practical aspects of teacher training in line with the National Curriculum (see section 4.3.3). The major changes in the criteria made by Circular 24/89 were as follows: the number of days students had to spend in schools was increased for students in four-year courses to 100 days, for other year courses to seventy-five days and for PGCE courses to thirty-six from thirty-four weeks; the 100 hours requirement was extended to science from mathematics and English; lecturers were required to have a minimum of thirty-five days' school experience in each five years of service; the phasing of students' teaching practice, the subjects to be prepared by primary-phase students, teacher involvement in planning and delivering courses, student selection and assessment, and some competencies for students to have acquired by the end of their course, were spelled out in detail.

The rising central control strategy was reflected in a growing emphasis on the relationship between HEIs and schools, thereby weakening the autonomy of higher education. The circular required that HEIs ‘should establish links with local authorities and a number and variety of schools, and should develop and run the professional and educational aspects of courses in initial teacher training in close working relationship with those schools’ (DES, 1989b, para. 1.1). Moreover, the two circulars (DES, 1984a; 1989b) can be understood in the context of the marketisation strategy in that, as Furlong et al. (2000: 25) put it, they aimed to ‘re-establish a national system of accountability in initial teacher education and progressively to introduce a more practically focused professionalism by opening up training courses to the realities of the “market” of school’. In terms of HILs, the Thatcher government’s consistent endeavour to increase time for students and lecturers to spend in schools can be understood as its growing emphasis on apprenticeship instituted previously in the early era governments.

3.3.3. Higher education reform and competence-based approach

Reform of HEIs for quality assurance and the end of the binary policy

Circular 24/89 defined a range of topics that had to be taken up within all initial teacher education programmes – a forerunner of the ‘competencies’ and ‘standards’ in the 1990s. It is worth mentioning the fact that, during the 1970s, competence-based and performance-based approaches to teacher education were popular in the USA (Tuxworth, 1989). In the early 1980s, they began to have some impact on the further education sector in the UK, and were given fresh momentum during the 1980s by the influence of ‘new vocationalism’ (see section 4.3.4) and by a wider debate about quality in education and training (Jessup, 1991). In England, the so-called ‘teaching quality debate’ pre-dates these competence-based and performance-based approaches, and it should be understood in a wider context of higher education reform.

The Thatcher government, since 1979 sought, under the New Right ideologies, to transform the British economy by means of the ‘enterprise culture’, with the frequently-stated aim of increasing the competitiveness of British industry (Coffield, 1990). With the emergence of total quality management (TQM) in manufacturing

industries, which had been developed in the USA in the late 1970s, the government paid much attention to the concept of quality control, or quality assurance, and intended to introduce this concept into higher education reform for national competitiveness. The White Paper (DES, 1987a) on higher education reflected this intention. In the paper, the government placed an emphasis on the notion of the quality and efficiency of higher education, spelling out the purposes of higher education with a statement that higher education should ‘serve the economy more effectively, pursue basic scientific research and scholarship in the arts and humanities, have closer links with industry and commerce, and promote enterprise’ (DES, 1987a: iv).

To this end, the government made proposals which were in line with its raising central control and marketisation strategies (DES, 1987a: 25-40): the relocation of public sector institutions including polytechnics and colleges of higher education from LEA control into a new sector of self-governing corporations; the establishment of a Polytechnics and Colleges Funding Council (PCFC) to allocate funds to this sector under contract; and the reconstitution of the UGC as a smaller Universities Funding Council (UFC) responsible for the distribution of funds among universities under new contract arrangements. These proposals were realised by the 1988 Act. In 1991, the drive to reform higher education for quality assurance reached a peak with another White Paper (DES, 1991a). In this paper, the government addressed the current arrangements for higher education from five quality assurance aspects, and proposed a new unitary higher education system in which quality control, quality audit and quality assessment should take centre stage (see Appendix 3.9). The proposals in the paper were duly incorporated into the Further and Higher Education Act 1992.

In the history of higher education, the 1992 Act is of great significance. First of all, the so-called ‘binary policy’ in higher education, which had continued for more than twenty-five years, came to an end by allowing polytechnics to become universities and abolishing the CNAA as a validating body for the public sector higher institutions. Second, a new unitary funding body for higher education in England, the Higher Education Funding Council for England (HEFCE), was created, replacing the existing UFC and PCFC. Moreover, the Act enabled the government, for the first time in Britain, to exert direct control over university teaching by requiring the HEFCE to

establish a ‘quality assessment committee’ to assess teaching (Section 70(1)) and by demanding that ‘the results of this assessment should inform the funding decisions’ (Tasker and Packham, 1994: 158). Following the removal of the binary divide, thirty-six former polytechnics and colleges were granted university status between 1992 and 1993 (Tight, 2007: 253).

Circulars of 9/92 and 14/93: competence-based approaches

With this growing emphasis on quality assurance, competence-based approaches to teacher education, although debates on them had been long-standing (Short, 1984; Tuxworth, 1989), were spotlighted by the two new circulars: Circular 9/92 (DfE, 1992a) for secondary courses and Circular 14/93 (DfE, 1993a) for primary courses. Socio-economic situations at this time are worth noting. As discussed, the British economy experienced a downturn in the early 1990s (see section 2.3.2). This eased the problem of teacher supply and consequently helped the government to be more involved in these competence-based approaches through the circulars. These two circulars, based on the government’s two strategies, were significant in many ways. First of all, as a means of ensuring quality, they produced sets of criteria in the form of competences expected of newly qualified teachers (NQTs) on which HEIs, schools and students were required to focus. The circulars contained official lists of competences under headings such as subject knowledge, subject application, class management, assessment and recording of pupils’ progress, and further professional development.

Second, teacher education became more school-based, whereby the status and autonomy of HEIs in the teacher training process were rapidly weakened. Kenneth Clarke’s intention to ‘see students actually getting into a classroom for much more of the time while they train’ (Clarke, 1991) was now fulfilled. Under Circular 9/92, students were required to spend at least two-thirds of their time in secondary schools which, instead of HEIs, now had to provide elements of training in subject-specific teaching methodology. Additionally, all schools, both maintained and independent, were entitled to apply to be partners in the educational market of initial teacher training alongside HEIs, taking ‘a leading responsibility for training students to teach their specialist subjects, to assess pupils and to manage classes; and for supervising and assessing their competences in these respects’ (DfE, 1992a: para. 14). In 1993, the

government went further by launching the most radical initiative of SCITT, a revival of apprenticeship in the early era governments, whereby consortia of schools would undertake the ITT function without necessarily involving HEIs as partners, or leading to an academic award.

Lastly, the two circulars contributed to the closure of CATE and the opening of a new organisation, the Teacher Training Agency (TTA). Graham and Barnett (1996: 163) point out that CATE was eventually considered by the government ‘to have fallen victim to producer capture by the educational establishment’, appearing ‘to support a continuing and significant role for HE in teacher education, in opposition to the government’s policy of further shifting the locus of initial teacher education into schools, with a diminishing role and shrinking funding for the HE sector’. The Education Act 1994 replaced CATE with the TTA. One of the objectives of the TTA in the Act was to ‘secure the involvement of schools in all courses and programmes for the initial training of school teachers’ (Section 1 (2)).

3.3.4. Changes in teacher education courses

New routes into teaching

During the late 1980s, the traditional four-year undergraduate and one-year postgraduate courses began to be complemented by new routes to QTS (see Appendix 3.10). The four-year BEd courses and BA/BSc with QTS courses were joined by shortened two-year and three-year undergraduate courses. The traditional one-year PGCE courses were complemented by various routes to the award of PGCE such as part-time PGCE, conversion PGCE and the articulated teacher scheme (ATS). In addition, the licensed teacher scheme (LTS) was introduced for non-graduates. Socio-economic situations were a significant contributor to the advent of these new routes. As we saw in Chapter 2, there was an economic upturn during the latter part of the 1980s. In line with this economic boom, the unemployment rate rapidly fell from a peak of 11.8 per cent in 1984 to a low of 7.1 per cent in 1990 (see Figure 2.4). The economic upturn at this time made it difficult for those in higher education to fill their teacher education courses.

In this situation, one of the measures the government chose was to attract new populations into the teaching profession through the introduction of a range of new routes into teaching (Barrett et al., 1992). Many of these new routes were related to shortage subjects. That is, the main reason for the introduction of these new routes was to deal with the problem of teacher shortages, particularly in certain subjects, deepened by the economic boom in the late 1980s. Furthermore, these routes were in line with the government's two strategies in that they contributed to marketisation in teacher education by enhancing the notion of choice and diversity and they challenged conventional models of teacher preparation and the autonomy of HEIs that provided them, encouraging school-based teacher education.

ATS and LTS

Furlong et al.'s (2000: 48) survey shows that during 1991/92 there were eighty-three non-conventional teacher education courses, and the total number of students in 1991/92 in seventy-four non-conventional higher education courses surveyed was 1193. Among these non-conventional courses, the ATS and LTS were significant in the development of teacher education courses. Following a tender process (DES, 1989c), the ATS officially began in September 1990 with sixteen consortia and 410 trainees; it was a new form of school-based PGCE. Under the ATS, LEAs were to operate schemes in consortia with HEIs; graduates had to spend two years rather than one year in training with 80 per cent of their time in school; articulated teachers were given a bursary rather than a means-tested grant, which helped attract students who were in financial trouble into the scheme; and school-based mentors were paid for their work with students in schools.

In 1992, the HMI began to evaluate the ATS and concluded that, despite its high cost, its graduates were not different in quality from those coming through more conventional courses (Ofsted, 1993a). Eventually, the ATS came to an end in 1994. However, this scheme is significant in that it acted as 'a forerunner of the move to make initial training more school-based' (DfE, 1993a: 23), providing the DfE with many practical lessons for shaping future policy. Its core notion for the school-based training was taken over by the subsequent circulars (DfE, 1992a; 1993a) and SCITT.

The LTS was first announced in a Green Paper (DES, 1988a) and launched in 1989 by Circular 18/89 (DES, 1989a). The scheme was somewhat radical in that it opened a new route for mature entrants with a minimum of two years of unspecified higher education to be recruited directly to paid positions in schools, together with on-the-job training provided by their employer – either an LEA or, in the case of grant maintained schools, the school governors. Licensees, who had to be at least 26 years¹¹ old, except in the case of overseas-trained teachers, were to be given a licence for up to two years, and were to be assessed for readiness for the award of QTS. In early 1990, the first licences were given, with 1500 licences issued by July 1992 (Ofsted, 1993b). The licensed teacher's employer had to decide how that training was to be organised while the ATS was a systematic programme organised through higher education.

When the government proposed the scheme, the NUT and NASUWT (National Association of Schoolmasters Union of Women Teachers) expressed their strong opposition to this scheme, regarding it as a great challenge to their teaching profession, but the LEAs experiencing teacher shortages saw it as an opportunity to solve the problem. This scheme is clearly in line with the government raising control strategy in that it undermined both the status of higher education in the process of teacher training and the professionalism of teaching by providing a legitimate way to obtain QTS without the involvement of higher education, which had previously been considered an essential part of professional preparation. The scheme was run until 1997 when it was replaced by the GTP and RTP.

3.3.5. New regime for accreditation: TTA and Ofsted

TTA: unified power over teacher education

The intention to set up the TTA was firstly expressed by a consultation document containing proposals for increasing the proportion of initial teacher training in schools and linking the funding of teacher training providers with quality assessment through the establishment of a new quasi-independent body, the TTA (DfE, 1993c: 6). The

¹¹ The minimum age was reduced to the age of 24 years by Circular 13/91 (DES, 1991e).

document was followed by considerable controversy. The Teacher Education Alliance, a non-party-political coalition of a wide range of organisations involved in education, contradicted the proposals through a number of its briefing papers, mainly arguing that no reasons were given as to why the government's objectives could not be achieved within the existing framework, and that teacher supply and the future of UDEs would be threatened (Mahony and Hextall, 2000: 12). Despite the protest, the Major government established the TTA through the enactment of the 1994 Act.

Further, from a political view, the increasing emphasis on school-based teacher training can be seen as a kind of response to growing criticisms from the right wing at this time. In 1990, Lawlor, a new director of the Centre for Policy Studies, which is regarded as a right wing think tank in England, argued for the immediate transfer of all teacher education to schools, together with the abolition of the PGCE and BEd and the closure of UDEs (Lawlor, 1990). Her argument gained much support from many on the political right wing and inspired the government to take action towards the setting-up of the TTA. The symbolic change in the title from 'education' to 'training' reflects this changing context of teacher education from institutional to school-based preparation. Some saw the establishment of the TTA as 'an attempt to introduce coherence into the system' or an answer to the problem of the gap of quality control (Mahony and Hextall, 2000: 13-14).

The establishment of the TTA can be understood as a complete version of the raising central control strategy of the government saturated in New Right ideologies. With the TTA, funding for ITT in England was separated from other forms of funding by the HEFCE. The new body took over not only most of the functions of CATE, but also the funding of all initial teacher education in England. The three core responsibilities concerning ITT – teacher recruitment and supply, the accreditation of courses and the funding of teacher education in England – came to lie with the TTA. The 1994 Act empowered the TTA to exercise three categories of functions: their functions as a funding agency; the function of providing information and advice on teaching as a career; and other such functions as may be conferred on them (Section 1(1)). The TTA is one of the representative quangos or NDPBs involved in education, and its employment practices reflect the fact that it is typically operated in accordance with the principles of new public management (NPM) (Hood, 1991). The TTA started

its work with a staffing complement of approximately seventy people and a board of twelve members plus five observers, with a number of board committees, sub-committees, working groups and advisory groups under the board.

Ofsted and privatised inspection

Government strategies were well reflected in the establishment of a new inspection body. The Education (Schools) Act 1992 created a new non-ministerial government department, the Office of Her Majesty's Chief Inspector of Schools, responsible for managing and regulating a national system of school inspection by independent inspectors in England. The new department was named the Office for Standards in Education (Ofsted). It comprised the HMCI and his staff, and began to operate with an aspiration of promoting 'improvement through inspection'. The establishment of Ofsted also meant that the time-honoured body, HMI, 'effectively ceased to exist' and the process of inspection was vested in the new body of Ofsted (Lee and Fitz, 1997: 39). As with HMI¹², Ofsted oversees the health of the inspection system. The 1992 Act required the HMCI to inform the Secretary of State of the quality of education provided by schools, the educational standards achieved by pupils, the efficiency with which financial resources were managed, and the spiritual, moral, social and cultural development of the pupils (Section 2 (1)).

However, the nature of inspection and its process is substantially different from that of HMI. In particular, the introduction of competition into inspection was somewhat radical. Under the Ofsted regime, schools came to be allocated to inspection teams, led by 'registered inspectors', by competitive tender, with Ofsted awarding contracts on a value-for-money basis. Independent inspection teams were increasingly awarded a substantial portion of inspection contracts with the LEA inspection teams' portion being decreased (see Appendix 3.11). Along with detailed regulations set out in the 1992 Act and the Education Act 1993, Ofsted's legal basis and control of national inspection were strengthened. The frequency of inspections was specified: all maintained schools in England would be inspected on a four-yearly cycle. Accordingly, the scale of the operation of Ofsted was greatly increased in comparison

¹² The Rayner Report states three principle functions of HMI: check on the use of public funds; the provision of information to central government; and the provision of advice to those running educational establishments (DES, 1982*d*: 7-8).

to that of HMI. Like the TTA, the establishment of Ofsted can be understood as one of a long sequence of endeavours by the New Right for quality control over the content of education. In a broader perspective, it is pointed out that:

Throughout the 1990s, one of the ways in which the state has attempted to exercise control over the content and quality of public services has been through the more regular and intrusive monitoring and inspection of those services which it purchases, and through the publication of the outcomes of such monitoring.

(Campbell and Husbands, 2000: 39-40)

Through Ofsted, the state as a purchaser now had the means to influence and define the scope, nature and delivery of education services by providers. As Gilroy (1999: 216) points out, when the TTA replaced CATE, it was originally proposed to take over all aspects of teacher education such as initial teacher education, continued professional development and educational research, using Ofsted for quality assurance. However, only initial teacher education came to be funded by the TTA and inspected by its agent Ofsted. Other subjects provided by universities were still funded by the HEFCE and their quality was assured by its agent, QAA, thereby disconnecting the funding of initial teacher training and its quality assurance process from that of other university subjects.

With the growing need for more quantitative forms of measurement in inspection, Ofsted began to develop a publicly available framework for the inspection of ITT, as well as for the inspection of schools (Ofsted, 1993d; 1994). In 1993, it produced a broadly-based framework for secondary initial teacher training (Ofsted, 1993c). The early work of Ofsted in ITT under the leadership of Stewart Sutherland, Vice-Chancellor of London University, was not confrontational toward HEIs, particularly to the older universities, similar to the way in which HMI had tentatively inspected ITT in universities 'under the terms of a concordat agreed between HMI and the universities' (Campbell and Husbands, 2000: 40).

3.4. Policies in the New Labour Governments

3.4.1. IILs

Further step of school-based training: SCITT and GTP

The Major government made two important policies which had an effect on the policies regarding initial teacher training courses during the New Labour governments. The first was the introduction of school-centred initial teacher training (SCITT). Following the two circulars (DfE, 1992a; 1993a), the policy stream toward school-based teacher training went much further with the 1993 consultation document, which included ‘a scheme for encouraging consortia of schools to offer postgraduate courses. Groups of schools pioneering this approach will be recruiting students for September 1993 and January 1994’ (DfE, 1993c: 4). As a result of this initiative, the SCITT scheme was launched as a pilot project in September 1993 with the first 250 student places being distributed among five different consortia (Ofsted, 1995; Evans, 1997b: 318).

These consortia were groups of schools that received funding directly from the government, and they were entitled to use the money at their discretion. This is very distinctive given the fact that schools in partnership with HEIs at this time were recompensed for their participation in training students by their partner HEI, which received per capita funding from the government. A more important point is that the scheme enabled the schools to provide initial teacher training courses without links with HEIs. With the scheme, apprenticeship in teacher education in the early era governments was revived in a transformed format for the modern world. SCITT, instituted under the Major government, was continuously enlarged under the New Labour governments.

The other policy was the proposal for the introduction of the graduate teacher programme (GTP). In October 1996, the government issued a consultation document (DfEE, 1996a). In the document, the GTP was announced as being ‘designed to offer a high-quality and cost-effective route into the teaching profession for suitable graduates who do not want to follow a traditional pre-service route’, but ‘would prefer

a tailor-made training route coupled with employment as a teacher' (DfEE, 1996a: 1). Moreover, it was designed to meet the needs of schools 'who wish to be directly involved in the training of their own teachers' without developing a SCITT scheme (DfEE, 1996a: 1). After a year-long consultation leading to minor amendments, the GTP was given permission to start under the Blair government, and began to operate in January 1998 (Foster, 2000: 298). This GTP grew into a leading employment-based route to teaching under the New Labour governments.

From competences to standards: a new framework under TTA and Ofsted

The competences set out in the circulars (DfE, 1992a; 1993a) were so broadly based that more influential on the content of training during the mid-1990s was 'the market', namely, current practice in the limited number of schools to which students were attached, largely due to their increased time in schools and the growing role for school-based mentors. However, in the latter part of the 1990s, central control over the content of ITT courses became much more detailed through the formation of competences into more elaborate standards for the award of QTS and the development of a National Curriculum for ITT, and compliance to this control was secured by Ofsted, which started to strengthen inspection for it during this period.

The drive to change the focus for training and professional development from professional competences to national standards was led by the TTA. In early 1997, just a few months before New Labour came into power, the TTA published a document (TTA, 1997a). When the TTA was developing the standards, it used the management standards produced by the Management Charter Initiative (MCI, 1997) as a crucial source of reference (Reynolds, 1999: 247). As seen in the letter from its chief executive to providers, the TTA intended to replace 'the more general "competences" which have been in force previously' with the standards which 'set out in more detail than ever before the core knowledge, understandings and skills on which effective teaching rests' (Millett, 1997).

After a period of consultation, the standards were incorporated into Circular 10/97 (DfEE, 1997b) under the Blair government. This circular was the first document on teacher education issued by the New Labour government. Nevertheless, except for the confirmation that teaching was to be a graduate career, the priorities given by the

previous government remained the same, with the need for subject specialist teachers at the upper primary phase and the regulations for SCITT schemes unchanged. Instead, the standards were used for the government to tightly control entry into the teaching profession. In addition, like the development of the standards for QTS, the move to develop a National Curriculum for ITT had already started with the advice of the TTA under the Major government in 1996, and the National Curriculum was finally introduced by two circulars (DfEE, 1997b; 1998b) under the Blair administration.

This tighter and more detailed approach was also employed by Ofsted for ITT inspection after Chris Woodhead was appointed as Chief Inspector in 1994. All primary ITT courses in England were inspected in just one year between 1995 and 1996, with a focus on the quality of training and of students' teaching in the four key areas of English, mathematics, assessment, recording and reporting, and quality assurance. Woodhead was not satisfied with the conclusion of the unpublished interim report (Ofsted, 1996a), which showed that standards in the inspected areas were 'generally sound or good'. Eventually, he announced that Ofsted would inspect all primary and secondary courses again over the next two years, along with a more detailed and specific framework. In 1996, a revised framework (Ofsted/TTA, 1996) was developed jointly by Ofsted and the TTA, and it became more tightly focused and detailed in a subsequently refined 1998 version (Ofsted/TTA, 1998) under the New Labour government.

3.4.2. Phases of institutional development of the TTA and Ofsted

From TTA to TDA

In terms of institutional development, the TTA has experienced four distinctive phases to the present day (see Appendix 3.12): shaping phase (1994-1995); expansive phase with increased remits (1996-1998); down and up phase with an emphasis on recruitment (1999-2004); and reformative phase with a new framework (2005 to present). During 1994 and 1995, the TTA shaped its organisational form by both taking over some responsibilities from other organisations and implementing its responsibilities stipulated in the 1994 Education Act. Until 1998, the TTA played a

key role as a key institutional agent in initial teacher education policy, undertaking increasing reformatory tasks given by government, along with its expanded remit.

In 1999, however, the TTA was faced with the threat of closure following a call for a quinquennial review by the Secretary of State, David Blunkett. At this time, it was seen as an annoying entity to training providers and there was a shortage in teacher recruitment, widely publicised by the media. A call for the abolition of the TTA was strongly raised by UCET, and many at the DfEE supported the call (Ellis, 2006: 5-1). During its first term, the Blair government was committed to modernising agencies and NDPBs to drive up the standard of public services (CO, 1997; 1998; 1999; HMT, 1998). The quinquennial review for the TTA was in line with this modernisation for raising standards strategy and allowed the TTA to survive with a narrowed remit, concentrating on its two initial priorities of 'teacher supply and initial teacher training' (DfEE, 1999a: 2). From that point the TTA put considerably more energy into increasing teaching recruits with new tasks suggested by the 1998 Green Paper (DfEE, 1998a). In February 2000, Ralph Tabberer took office as Chief Executive and succeeded in acquiring an extra annual budget to support the TTA's new recruitment strategy. By 2004, the TTA had a successful record of recruitment and eventually regained full confidence from the government.

In September 2005, the TTA experienced a reformatory phase with its name changed to the Training and Development Agency for Schools (TDA). The TDA is a reformed body from the old TTA, operating within a new framework. Its primary remit now lies in the training and development of the whole school workforce, in contrast to the TTA which was responsible mainly for the training of teachers. Therefore, the new TDA is required to play a role for schools as well as for teachers. Its emergence is in line with the school workforce reform for raising standards (see section 5.4.3), which was formed from the merger of the TTA and NRT (National Remodelling Team) (TDA, 2006a: 2). Additionally, schools are required both to provide a range of extended services, related to the children agenda (HMT, 2003) such as 'childcare, adult education, parenting support programmes, community-based health and social care services, multi-agency behaviour support teams and after-school activities' (DfES, 2005a: 7) and to deliver higher standards in education (DfES, 2004c; 2005b). Under the modernisation strategy, the government sees the TDA as its 'modernising agency'

designed ‘to ensure there is a coherent approach to workforce change and development across the school system’ (TDA, 2006a: 3).

Ofsted

Since its inception, Ofsted has experienced three distinctive phases, together with its expanded remit (see Appendix 3.13): early phase with the regular inspection of schools (1992-1996); expansive phase alongside other inspection organisations (1997-2006); reformative phase with a single inspectorate for children and learners (2007 to present). When Ofsted was formed, the number of HMIs was reduced from over 500 to 175 (Matthews and Sammons, 2004: 7), so, consequently, the coverage of educational phases and subjects by HMIs had to be greatly reduced, with their ‘district inspector’ links with LEAs disappearing and the direct inspection of schools being contracted out to independent inspectors selected and trained by Ofsted. However, the inspection of initial and in-service teacher education, youth services and some independent schools was still conducted under the new Ofsted regime.

From 1997, Ofsted expanded its remit substantially, together with an increasing number of other inspection and regulatory bodies¹³. The Education Act 1997, one of the last statutes introduced by the previous Conservative government, enabled Ofsted to inspect LEAs. Nursery education came fully into the remit of Ofsted under the School Standards and Framework Act 1998. Its remit went further with the Learning and Skills Act 2000, which enabled it to inspect for 16 to 19-year-olds in the further education sectors as well as in schools. The Act also provided Ofsted with a common inspection framework for joint inspections with the ALI¹⁴ where the provisions overlapped and a new youth service in England, known as the Connexions Service, became available through the Act. Another big step towards a more expanded body was taken by the Care Standards Act 2000. The Act transferred the responsibility for the regulation of child minding and day care provision from local authorities to Ofsted, with the view to bringing together the regulation of childcare and early years’

¹³ The main bodies set up for public sector inspection since 1997 include the Quality Assurance Agency for Higher Education (QAAHE, 1997), Benefit Fraud Inspectorate (BFI, 1997), Adult Learning Inspectorate (ALI, 2000) and Her Majesty’s Crown Prosecution Service Inspectorate (HMCPSI, 2000).

¹⁴ It was established by the Act to inspect all further education for those aged 19 and over and work-based training for all ages.

education. By 2000, Ofsted had its remit expanded from early years' childcare to 19-year-olds in further education.

As inspections and external review bodies increased in number, the need for the government to set guidelines to ensure their performance and accountability was enlarged. In December 2001, a call for a full review of the role of externally reviewing public services was first raised by a report (Byatt and Lyons, 2001) with the recommendation of a more performance-focused approach. In 2003, the Office of Public Services Reform (OPSR), in the Cabinet Office, commissioned to carry out this full review, published two documents (OPSR, 2003a; 2003b) envisaging a new inspection policy with a focus on its contribution to improvement of public services and value for money. In 2005, a risk-based approach instead of a 'one size fits all' approach to regulatory inspection was recommended by a review (Hampton, 2005) in support of the government's drive to lessen the administrative burdens facing business.

In response to these recommendations, the government decided to reduce public sector inspectorates from eleven to four, with single inspectorates for criminal justice, education and children's services, social care and health, and local services, as well as cutting inspection bodies for business from thirty-five to nine (HMT, 2005). Following the decision, the new Ofsted¹⁵, the Office for Standards in Education, Children's Services and Skills, was established on 1 April 2007 by the Education and Inspections Act 2006. The new Ofsted brought together the work of four organisations: the work of 'old' Ofsted, the work of ALI, the children's services responsibilities of the Commission for Social Care Inspection, and the children and families elements of Her Majesty's Inspectorate of Court Administration (Ofsted, 2007a: 24). As with the TDA, the new Ofsted came to have an expanded remit covering children, young people and adult learners.

¹⁵ Despite its reorganisation, the 'Ofsted' acronym is still used.

3.4.3. Standards and the National Curriculum

Standards for QTS: Circular 10/97 and Circular 4/98

From the very start of the modernisation strategy, the Blair government was involved in changing teacher professionalism to meet the challenges of globalisation. In his opening forward to *Excellence in Schools*, David Blunkett demanded that teaching should be a 'can do' profession (DfEE, 1997a: 4). A further step was taken by the 1998 Green Paper published in December. In the paper, the government set out their intention to modernise the teaching force with the development of what they called a 'new professionalism', spelling out requirements needed by teachers in a modern teaching profession (DfEE, 1998a: 14). This policy stream of new professionalism can be understood as the final completion of a thirty-year shift from the past 'individualised professionalism' to the new forms of 'managed' and 'networked professionalism', accepting that 'decisions, about what to teach and how to teach and how to assess children, are made at school and national level rather than by individual teachers themselves' (Furlong, 2005: 120).

In line with this policy stream, two months after its coming into power, the Blair government issued Circular 10/97 entitled *Teaching: High Status, High Standards* (DfEE, 1997b), which was substituted one year later by Circular 4/98 (DfEE, 1998b) with the same title. These two circulars are significant in that they officially replaced the competences set out in the previous circulars (DfE, 1992a; 1993a) with new standards for QTS. Hextall and Mahony (2000: 325) summarise four main reasons for the introduction of QTS standards: 'the difficulty of ensuring quality and consistency in a context where a variety of diverse routes into teaching had been established'; 'the perceived desire for greater control by central government'; 'the increasing use of standards in other countries, particularly Australia and Canada, in the development and assessment of teachers'; and 'the need for a procedural basis for the inspection of initial teacher training against national criteria'. Furthermore, the introduction of the standards can be understood as an embodiment of the modernisation for raising standards strategy in initial teacher training. Circular 10/97 made it clear:

To raise the standards we expect of schools and pupils, we must raise the standards we expect of new teachers. This Circular sets out a range of new

requirements for initial training intended to ensure that all initial training providers match the quality and breadth of the best and to underpin higher standards and effective teaching in schools.

(DfEE, 1997b: 3)

As Burgess (2000: 409) points out, it is ‘the standards which carry the award of qualified teacher status and this is separate from any academic qualification that students might achieve’. The circular states that ‘the standards apply to all trainees’ seeking QTS and ‘should be met by those to be assessed for QTS from May 1998’ (DfEE, 1997b: 6). These national standards were confirmed and expanded upon in Circular 4/98. There is not much difference between the main headings of the early 1990s circulars on competences and the late 1990s circulars on standards for the award of QTS (see Appendix 3.14). However, in the late 1990s circulars, the content under each heading was specified in more detail by different standards, using more precise and prescriptive language than in the past.

Despite this specification, the standards developed by the TTA were faced with criticism in respect of the theories employed. Reynolds (1999: 251) argues that these standards seemed to be an amalgamation of reconstituted competences, unlike the management standards, containing little comprehensive account of the factors which are important for effective practice. The form of their presentation gave little insight into the nature of quality teaching, concerning itself with aims and goals and the way of interrelating between knowledge and understandings, and bypassing the problems of assessment by not having an assessment model at all (Furlong et al., 2000: 152).

National curriculum for ITT

The two circulars (DfEE, 1997b; 1998b) set out not only the national standards for the award of QTS, but also the National Curriculum for ITT. The National Curriculum was developed in four areas – English, mathematics, science, and ICT (information and communication technology) – for both primary and secondary school teachers. Initially, Circular 10/97 set out a National Curriculum in two subjects – primary English and mathematics – along with the standards. Later, Circular 4/98 provided the whole national curricula of the whole four areas. The National Curriculum set out in the two circulars was the work of the TTA in collaboration with teams of subject

experts, many of whom were involved in ITT, and Woodhead exerted some influence in its development, particularly in the area of the teaching of reading.

Among nine annexes in Circular 4/98 (see Appendix 3.15), seven from Annex B to H were for the National Curriculum amounting to around eighty-five pages, and most of them were organised in three sections: knowledge and understanding to secure pupils' progress in the subject; effective teaching and assessment methods; and trainees' knowledge and understanding of the subject. In the first two sections, the curriculum set out in great detail exactly what trainees must be taught. Every third section was followed by an extensive checklist against which trainees' knowledge and understanding of the subject had to be audited. The development of the curriculum was a highly intensified control over ITT courses, which is clearly in line with the government's raising standards strategy in that the curriculum was intended to 'represent a key element in the government's plans for raising attainment in literacy and numeracy and making progress towards the national targets' (DfEE, 1998b: 5).

The National Curriculum was developed through an extensive consultation on draft versions alongside a series of national meetings. However, the introduction of the curriculum brought about immense changes to course design and content, student assessment, teaching placements and the management and administration of teacher education programmes (Burgess, 2000: 405-406). More importantly, the curriculum was seen as 'a fundamental challenge to the claim to special knowledge that lies at the heart of professional status' (Jacques, 1998: 20). As expressed in its own commissioned reports (Richards et al., 1997; Maguire et al., 1998), on each curriculum document the Association of Teachers and Lecturers (ATL) saw the introduction of the curriculum as a further undermining of the autonomy of the teaching profession. In these reports, the most highly controversial were seen to be the ICT and English curricula, while the content of the mathematics and science curricula was regarded as largely uncontroversial. In respect of the ICT curricula, the practical problem was that most schools, universities and colleges were poorly equipped for providing the ICT training required by the curricula (Atkinson and Lewis, 1998: 8; Maguire et al., 1998: 33). The English curriculum was more politically controversial, particularly with regard to the emphasis on the teaching of reading by phonics and on standard English and grammar (Richards et al., 1997: 20-23).

Qualifying to teach

During 1999, the TTA reviewed Circular 4/98 in response to growing concerns that ‘the teaching and training in the foundation subjects would suffer due to the emphasis on the core curriculum for primary schools’ (Burgess, 2000: 410-411). In September 2000, the revised version of Circular 4/98 (DfEE, 2000a) came into force and had a significant impact, particularly on postgraduate teacher training. However, the National Curriculum for ITT was short-lived. In January 2002, the government officially abandoned the curriculum by issuing a document entitled *Qualifying to teach* (DfES/TTA, 2002), and returned to a more general and relatively brief list of standards. This document came into effect in September 2002, replacing Circular 4/98. The main body of the 2002 document consisted of two sections, also very similar to those of Circular 4/98 (see Appendix 3.16). However, in the 2002 document, standards and requirements were ‘more concise’ and ‘manageable’, together with ‘a clearer structure’ consisting of just thirteen pages (Richards, 2002: 6).

Furlong (2005: 127) argues that the policy change marked the move towards ‘more direct strategies of intervention’ away from ‘seeing initial teacher education in itself as the main strategy for changing teacher professionalism’. In respect of teacher education history itself, the 2002 document has some significant meanings. First of all, it was used as a basic framework for ITT until recently. The TTA and its successor, TDA, subsequently issued revised versions together with the education department (DfES/TTA, 2003a; TDA, 2006b), but the standards for the award of QTS and the requirements for ITT have remained almost the same. Moreover, the standards and requirements set out in the 2002 document gave Ofsted a bedrock on which it has been developing guidelines and conducting various inspections. For example, Ofsted published handbooks for the inspection of ITT (Ofsted, 2002b; 2007c) which were developed in relation to the standards and requirements in the 2002 document. What is more, the document was accompanied by a handbook of guidance (TTA, 2002) developed by the TTA to help explain the standards and requirements. The guidance in the handbook is non-statutory. However, in practice, was more than guidance itself for providers of ITT since the handbook has remained a key document for Ofsted to manage its inspection system. The handbook has been subsequently updated (TTA, 2004a; 2005; TDA, 2006c).

3.4.4. Changes in initial teacher training courses

Current routes and ITT programmes

As with the previous Conservative governments, the Labour government under the Third Way ideologies maintained a competitive market in teacher education. In understanding New Labour's policy on ITT, the 1998 Green Paper is a very significant document in that it delineated the directions for future policies on teachers; thereafter, most teacher policies were developed on the basis of the proposals provided by this Green Paper. The main concern of these proposals was with 'further changes' needed to 'make initial teacher training more flexible and more rigorous' (DfEE, 1998a: 43). In particular, and of great importance in terms of ITT, were the seven proposals set out in the paper as follows:

- New national tests for all trainee teachers to guarantee high-level skills in numeracy, literacy and ICT;
- New pre-course provision for trainee teachers;
- Review of the procedures for Qualified Teacher Status;
- A network of schools to pioneer innovative practice in school-led teacher training;
- More flexible courses for initial teacher training;
- A boost to employment-based routes into teaching; and
- A new national fast-track scheme to recruit from the best graduates and move outstanding teachers quickly through the profession.

(DfEE, 1998a: 43)

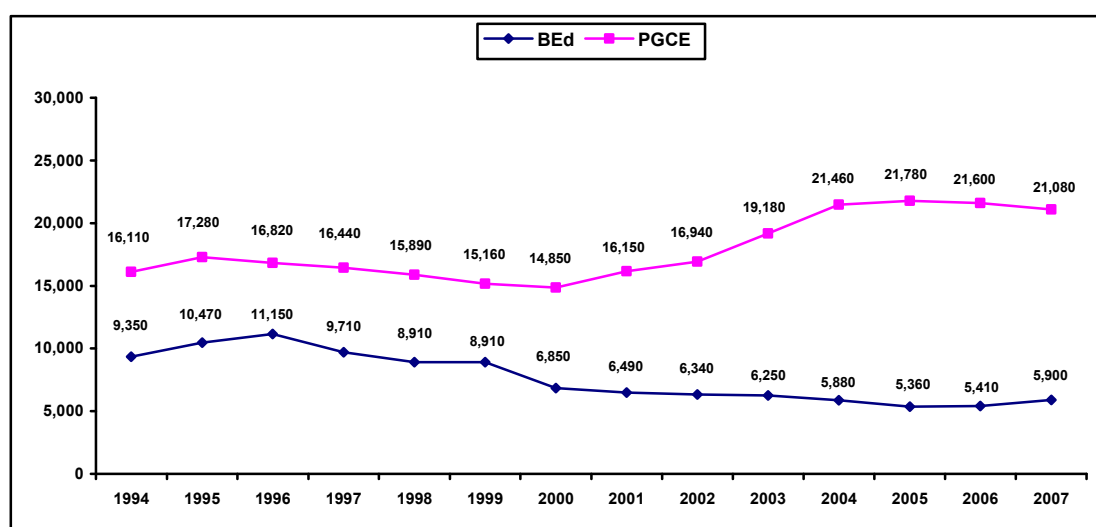
Many New Labour policies on teacher education courses were developed on the basis of these proposals. It is notable that since the introduction of the National Curriculum for ITT there have been some changes in the use of terms in official documents: 'trainees' is frequently used instead of 'students'; 'teacher education' is now 'teacher training'; and teacher training institutions are often referred to as training providers. This terminological change symbolically reflects the government's emphasis on more flexible and school-based teacher training for practical skills and knowledge in schools as a modernised form of apprenticeship. Currently, ITT is provided not only

by HEIs, but also by the SCITT and EBRITT providers, with flexible routes and programmes for ITT growing (see Appendix 3.17).

Changing position between BEd and PGCE courses

Since the PGCE became the major route into teaching by 1980, its position was maintained and strengthened thereafter. Figure 3.3 provides some information on the changing relative position between BEd and PGCE courses. The number of BEd completers decreased from 9,350 in 1994 to 5,900 in 2007. In contrast, the number of PGCE completers increased from 16,110 to 21,080 in the same period. The figures from 2003 show that more than three times the amount of teachers qualified with a PGCE compared to those with a BEd. Socio-economic situations at this time are worth noting. The economic upturn under New Labour contributed to a consistent fall in unemployment (see Figure 2.6), which resulted, by 1998, in a shortfall of 25 per cent against secondary level recruitment targets, with the greatest shortages in the subjects of mathematics, science, modern foreign languages and technology (DfEE, 1998a: 14). From September 1999, the government responded by introducing financial incentives such as training bursaries, grants and ‘golden hellos’ for all postgraduates training to teach these shortage subjects (DfEE, 1998a: 72). This initiative contributed to the fall in the numbers undertaking BEd courses. The fall of the BEd, however, reflects the fact that teaching was becoming more of a postgraduate profession in England.

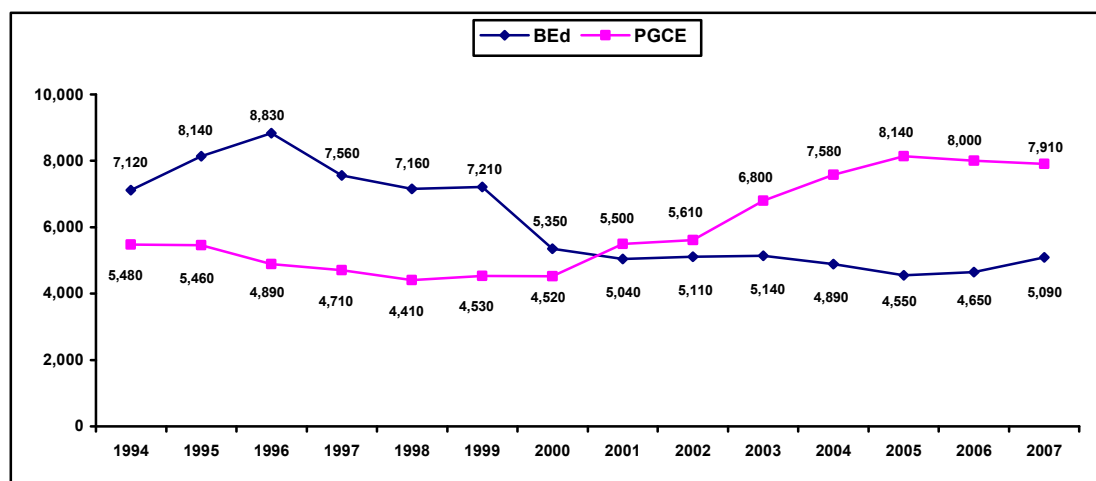
Figure 3.3 BEd and PGCE completers in England, 1994-2007



Source: DfEE (1998c: 5), DfES (2002e: 17; 2005j: 18), DCSF (2008n: A5)

Traditionally, BEd courses were regarded as training teachers for primary schools while PGCE courses were for secondary school teachers. However, the growth of the PGCE changed this traditional notion. As we see in Figure 3.4, by 2000 the BEd maintained its majority position in the training of primary teachers with regard to the number of completers for primary education. However, from 2001 it was overtaken by the PGCE, and the gap broadened along with the fall of BEd courses. Now, we can conclude that currently the PGCE is the main route for both primary and secondary school teachers.

Figure 3.4. BEd and PGCE completers for primary education in England, 1994-2007



Source: DfEE (1998c: 5), DfES (2002e: 17; 2005j: 18), DCSF (2008n: A5)

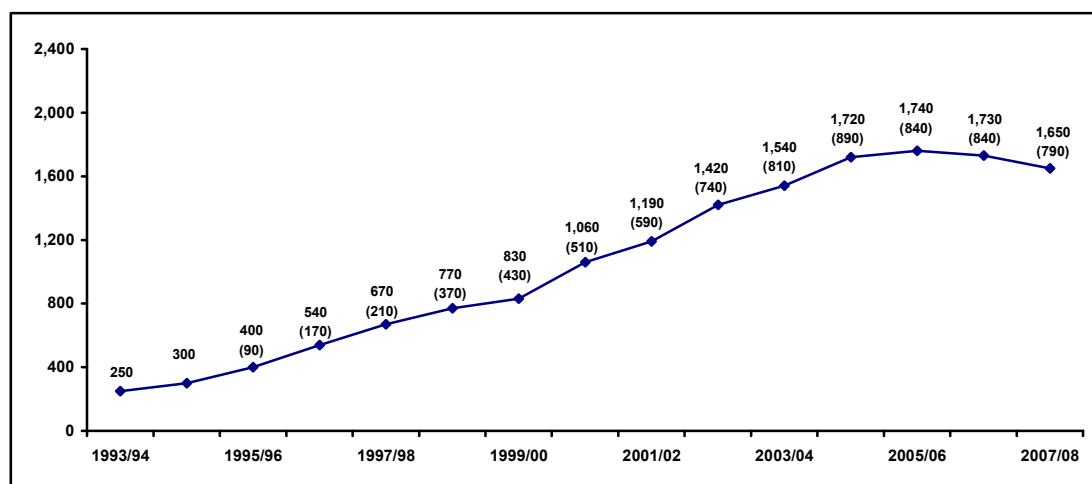
Growth of SCITT

As Figure 3.5 below shows, following the pilot period of 1993/94, the number of entrants to SCITT schemes steadily increased with the active support of the TTA. Initially, SCITT schemes were PGCE courses for training secondary school teachers and later developed into courses for training both primary and secondary school teachers. Early inspection results showed that SCITTs performed substantially worse on average than traditional routes, and were met with criticism about the way they were established and implemented (Sutherland, 1997). More recent inspection results showed that ‘school-centred providers continued to perform less well than HEI-based partnerships’ (Ofsted, 2003a: 4). Despite these inspection results, SCITT schemes were given constant support by both the Major Conservative and Blair Labour

governments, which reflects the longstanding influence of apprenticeship instituted in the early era governments as an HIL.

Figure 3.5. Entrants to SCITT courses, 1993- 2008

(): primary



Source: DfEE (1997: 1), DfES (2002e: 13; 2005j: 13), DCSF (2008n: A1)

From a pedagogical perspective, the time-honoured debates on teacher education such as theory versus practice, training versus education and school-based versus university-based were reflected in SCITT. If we understand the government's initial emphasis of partnership between HEIs and schools as an endeavour to 'bring about a closer relationship between theory and practice' in teacher education (Sorensen et al., 2005: 383), the introduction of SCITT can be understood as a strong expression of the government's will to give priority to 'practice', 'training', and 'school-based' teacher preparation.

From a practical perspective, what should be noted is that, with the introduction of SCITT, schools emerged as a new teacher training institution competing with conventional providers – HEIs – for teacher education. Currently, schools are strongly encouraged to become fully involved in all aspects of ITT. This involvement can take one of three forms: through a partnership with a HEI or university accredited by the TDA; through the establishment of a SCITT consortium in which a group of schools is accredited by the TDA to provide training; or through the employment of an unqualified member of staff who is trained on the basis of the employment-based programmes. In fact, schools are key institutional agents in nurturing these new routes, designed by the government, into teaching.

3.4.5. More flexible and school-based teacher training

Expanding employment-based routes: GTP

What is striking among a number of policy changes in teacher training courses under the New Labour government is the rapid growing of employment-based routes (EBRs) into teaching. The GTP, RTP¹⁶ and OTTP¹⁷ are EBRs developed under the New Labour government (see Appendix 3.18). The LTS, developed in 1989 as an EBR under the Conservative government (DES, 1989a), was replaced in 1997 by the GTP and RTP schemes with arrangements for the training and accreditation of overseas-trained teachers being placed into the GTP and RTP. The basic concept of these routes laid in allowing different groups of candidates to qualify as teachers through on-the-job training while they worked in schools. Currently, these three programmes are provided by EBITTPs¹⁸. Among these routes, the GTP and OTTP have increased strikingly in the number of entrants and the GTP has been leading these routes (see Appendix 3.19).

The GTP was designed for mature graduates aged at least twenty-four¹⁹, and whose degrees and educational and working backgrounds provided a basis for teaching in their chosen phase and/or subject. Although the normal length of the training was one year, it was also flexible to meet individual needs and circumstances: one-term (thirteen weeks) and two-term alternatives were available for trainees with previous achievements. The government took a further step towards expanding EBRs by the publication of a consultation document (DfEE, 2000b). From September 2000, the TTA began to pay schools salary grants as well as training grants, enabling GTP trainees in schools to be supernumerary, with the aim to ‘boost recruitment, especially in the shortage subjects and from groups not adequately represented within the teaching force (men in primary schools and both men and women from minority ethnic groups)’ (Ofsted, 2002a: 2). In addition, the OTTP separated from GTP arrangements in September 2000.

¹⁶ Registered Teacher Programme.

¹⁷ Overseas-Trained Teacher Programme.

¹⁸ Employment-Based Initial Teacher Training Providers.

¹⁹ From January 2004, trainees did not need to be over 24 when they started their training.

Initially, GTPs were run by recommending bodies (RBs), which, as time progressed, developed into designated recommending bodies (DRBs) able to reliably deliver training to QTS standard over time (TTA, 2004b: 3). Currently, most DRBs are an EBITTP, which is a DRB that ‘has been inspected by Ofsted and accredited by the TDA’ (TDA, 2006d: 6). In terms of their constitution and operation, EBITTPs reflect the new partnership strategy in that, as with RBs and DRBs, they are partnerships made up of bodies such as schools, LEAs and accredited ITT providers (including HEIs), empowered to design and deliver individual teacher training programmes via the GTP, RTP and OTTP. Currently, the GTP is provided by all 103 EBITTPs, some of which also provide the RTP and/or the OTTP (TDA, 2009b). It is worth noting that these kinds of EBRs can be found in other English-speaking countries such as the USA, Canada, Australia and New Zealand (Griffiths, 2007: 107). Some research on the effectiveness of these EBRs provides a mixed picture (Foster, 2000, 2001; Brookes, 2005; Young and Mandzuk, 2006, Griffiths, 2007; Mead, 2007). Ofsted (2007b: 3) found that ‘there are unacceptable variations in the quality of GTPs from school to school’ but the Labour government seems to want to keep expanding these EBRs.

Inventing more flexible routes: flexible PGCE, Fast Track, Teach First

In October 2000, the TTA introduced the ‘flexible PGCE’ route to QTS as a series of measures to increase the supply of teachers. Its rationale was to provide access to teaching for those who, due to their personal circumstances, could not follow a standard one-year PGCE course (Ofsted, 2003b: 4). As discussed, since the 1990s, traditional PGCE courses were already on the way to being flexible. The introduction of the flexible PGCE was in line with this policy stream. The new route allowed trainees to start and finish their training at many different times of the year and lasted long enough for them to meet the national standards, with each trainee being allocated an individual training programme (TTA, 2001). In 2000/01, thirty-three providers offered flexible PGCE courses with 2,051 places available, and the number of providers increased to thirty-six with 2,356 places in 2003/04 (Ofsted, 2003b: 10). In 2007, the separate category of flexible ITT programmes was eliminated in order to only offer providers full-time or part-time postgraduate options with substantial flexibility (TDA, 2007a: para. 15).

More flexible routes recently introduced are the Fast Track and Teach First schemes. The two new schemes are distinguished from the other schemes mentioned to this point, but they are in line with the raising standards strategy in that they are clearly focused on attracting highly able graduates into teaching. Fast Track is an accelerated leadership programme set up in 2000 by the DfES. Originally, it aimed to attract and retain a small cohort of very able graduates and career changers by providing a high-status career pathway (King, 2006: 102). In September 2001, the first Fast Track trainee teachers were recruited and assigned the number of 'cohort 1' for administration purposes: the cohort 1 group with 110 trainees commenced their PGCE course in 2001 through to cohort 5 with 420 in 2005. Trainees were offered a number of benefits and received financial rewards for the extra responsibilities undertaken, as well as support and development opportunities.

For many teachers, Fast Track is seen as an elitist scheme, which makes them hesitate to be actively involved in it. Moreover, the high costs to recruit and train a Fast Track teacher have been criticised (Thornton, 2003; Barnard, 2004). However, it is worth noting that Fast Track is the first scheme directly developed and funded by the DfES for further modernisation of the teaching profession. Since 2002, Fast Track has become a dual entry programme with the first serving teachers taking up places on the programme under the category name of 'cohort A'. The route for those new to teaching was closed after the intake in 2005, largely due to the upturn in teacher recruitment over the previous few years and the higher economic cost and lower retention rate for new entrants to the profession (Jones, 2006; King, 2006). Since then, Fast Track has remained a leadership programme, with a single entry route for serving teachers with the National College for School Leadership (NCSL) undertaking the responsibility for the scheme in September 2006.

Teach First (TF) is an EBR-designed initiative intended to recruit outstandingly able graduates who commit themselves to teaching for two years in challenging secondary schools. This scheme is in line with the new partnership strategy in that the introduction of this scheme was led by two business membership organisations, London First and Business in the Community. This scheme is a further shift in responsibility for teacher education since the introduction of SCITT, with businesses actively intervening in initiating teacher education. Furthermore, the development of

the scheme was inspired by the highly successful American scheme, Teach For America (TFA); so much so that the Teach First scheme shares considerable similarities with the TFA scheme in many respects (TF, 2009; TFA, 2009). As the term Teach *First* implies, this scheme anticipates and accepts that many of the participants will go on to careers in other sectors after two years of teaching first (Hutchings et al., 2005: 2).

Teach First had its first intake of 170 in 2003, and was restricted to secondary schools in London. Following Gordon Brown's 2005 budget speech (HMT, 2005), currently this scheme has extended, with an intake in 2008/09 of 350, to secondary schools in London, the North West and the Midlands. Despite its small scale, for the Labour government this scheme seems to be of great importance. As Sorensen et al. (2005: 385) point out, this scheme gives a strong impetus to three strands of government policy set out in the 1998 Green Paper: 'a more school-based program; recruitment of high achieving graduates and a focus on inner city schools facing recruitment difficulties'.

3.5. Summary

In this chapter, I have explained teacher policy developments in the first teacher policy area of initial teacher training, focusing on the three key policy themes of ITT institutions, ITT courses and accreditation regimes. In the early era governments, a model of apprenticeship was used as school-based training under the monitorial and pupil-teacher systems, and training colleges and UDEs developed into representative training institutions. In the post-war era governments, initial teacher training experienced an expansive and transformative phase, along with a series of policies under the situation of the growing school population and economic affluence. In this period, institutes of education acted as ATOs, the training course was lengthened to three years, training colleges were renamed colleges of education, polytechnics joined teacher training and the CNAA acted as a validating body for them, and the BEd was introduced and later followed by newly revised courses. Finally, colleges of education

were reorganised into colleges of higher education, and training courses took on only one of the two types of the PGCE and BEd.

The Thatcherite governments introduced more regulative and reformatory policies. Criteria for the accreditation of training courses were introduced, together with the establishment of CATE, and were replaced in the early 1990s with competences for QTS following HEI reform for quality assurance. The traditional PGCE and BEd courses were supplemented by new, flexible and school-based routes to teaching. Central control over teacher education was further strengthened with the establishment of the TTA and Ofsted. The New Labour governments introduced more prescriptive and school-based policies on initial teacher training. Competences were replaced with more detailed standards for QTS and the national curriculum for ITT was introduced. New Labour made teacher training more school-based by introducing new EBRs and flexible routes to teaching, and giving continual support for SCITT.

Chapter 4: Policies on the Curriculum and Teaching

The previous chapter addressed policies in the first teacher policy area of initial teacher training. This chapter addresses policies in the second teacher policy area of curriculum and teaching. Policies on the school curriculum and teaching have various dimensions, so they need to be understood in the whole teaching context related to questions such as: what should be taught (content)?; how should it be assessed (examinations/assessment)?; how should it be taught (teaching method)?; and what should be the teachers' role, knowledge, and autonomy in a certain school system (professional autonomy and school system)? These questions are also a political matter, that is, who controls and changes the curriculum? This chapter analyses policies on the curriculum and teaching through the consideration of these particular aspects.

4-1. HILs in the Early Era Governments

4.1.1. Religious education and the three Rs

Church and education

In the latter part of the eighteenth century, early forms of an elementary school included 'dame schools', 'common day schools', 'schools of industry' 'charity schools' and 'Sunday schools', many of which survived into the following century (Barnard, 1961:2-11). Dame schools and common day schools can be seen as early forms of private elementary schools in that they provided a fee-paying education, even though the weekly charge for each pupil was just a few pence. Dame schools were run usually by elderly women or ladies, and the terms 'preparatory school', 'ladies school' and 'ladies seminary' were on the continuum of dame schools (Leinster-Mackay, 1976: 36). As we can see from the term 'preparatory school', the dame school provided an education for younger children, to some extent playing the role of an infant school (Roberts, 1972). In contrast, the common day school provided

a form of elementary education for rather older children. In the latter part of the nineteenth century, dame schools were officially appraised as being ‘generally very inefficient’ by the Newcastle Commission (NC, 1861: 29). Moreover, many common day schools, if not all, were criticised for being inefficient, but the monitorial system in the nineteenth century was introduced and worked out in this kind of day school.

Charity schools, schools of industry and Sunday schools were all philanthropic schools for the children of the poor. The origin of education for the poor in England is closely related to the role and influence of churches, especially the established Church. Since the sixteenth century, when the state took supreme control of the Anglican church, a close alliance between the state and the church was prerequisite, until the early decades of the nineteenth century because the change of the national religion inevitably would lead to a change in the organisation of the state and vice versa. The four subsequent statutes since the Reformation, that is, the Corporation Act 1661, the Act of Uniformity 1662, the Conventicle Act 1664 and the Five Mile Act 1665, empowered the church to hold its strong grip on society against dissenters.

In particular, under the 1662 Act that remained in force until 1869, all clergymen, teachers, or tutors in any kind of private or public school were required to conform to the liturgy of the church and subscribe to its ‘thirty-nine articles’; the remit of the Act also extended to all tutors, masters, fellows, and chaplains in any college or university (Delve, 2003: 143). In this situation, it was logically accepted that schools and universities should defend both the Church and state from potential enemies, and the government should ensure that the licensing of teachers and the provision and overseeing of education should be under the control and auspices of the Church (Murphy, 1971: 1). Accordingly, it was hardly surprising that there was a general agreement at the time, before state intervention in education, that the education of the poor should be shouldered by the Church.

SPCK and charity schools

It is through charity schools that the Church, along with its voluntary bodies, began to be actively involved in educating poor children on a large scale. The development of charity schools was facilitated with the foundation of the SPCK. From 1699, the SPCK began to coordinate the charity school movement, and the endowed and

subscription charity schools²⁰ were ‘the chief, and, in many places, the only means of education for the children of the poor’ until Sunday schools appeared in the last quarter of the eighteenth century (Jones, 1938: 23). At first, charity schools began in London and then spread throughout most British urban areas. By the middle of the eighteenth century the number of schools connected with the SPCK was over 2,000, with over 50,000 places (Morrish, 1970: 5).

The curriculum of charity schools included religious instruction and reading, and in some schools writing and arithmetic were added; however, religious instruction was the most important part. This is not surprising considering the fact that charity schools were associated with parishes and the teachers were required to be members of the Church (Jones, 1938: 98). The SPCK’s founders were primarily concerned to ‘counteract the growth of vice and immorality’, and they thought the best way to tackle the situation was ‘through encouraging education and the production and distribution of Christian literature’ (SPCK, 2008). Additionally, it was felt that ‘a translation of the Bible was useless without the ability to read, but literacy would enable the poor to discover for themselves the truths of Protestantism and reject Catholicism’ (Tomkins, 1997: 53). The main teaching method in religious instruction was based on a catechism which was performed by the clergy. As Goldstrom (1972: 11, 14) puts it, the charity school education at this time was ‘confined to moral and religious instruction’ and reading materials used in charity schools were just ‘the Bible, catechisms, sermons and school readers of stern moral tone’.

In addition to religious instruction, subjects such as spinning, sewing, knitting, gardening, and even ploughing were taught in charity schools to develop ‘habits of industry’. This emphasis reflects the socio-economic situation of England in the eighteenth century. As with other European countries, England has had a long tradition of a hierarchical society. In this situation, charity schools ran the curriculum for the children, who were expected to be honest and industrious ‘servants’ or ‘apprentices’ (SPCK, 1708; 1711; 1712). By the end of the eighteenth century, charity schools were faced with much criticism regarding every aspect of the teaching process,

²⁰ In the eighteenth century there were other kinds of charity schools such as non-conformist and Roman Catholic charity schools, but they had no central coordinating body like SPCK (Jones, 1938: 25).

especially the curriculum, teaching methods and teachers' competence (Barnard, 1961: 7) – reading books were too difficult for the children to understand; the Bible and prayer book were taught by rote mechanically; parish clergy catechised perfunctorily; and teachers were incompetent. In this situation, the charity schools became fewer in number and lost their initial zeal and impetus.

Sunday schools and voluntary day schools

Sunday schools are another type of school through which churches provided an elementary education for working class children from the late eighteenth century. At the time of the industrial revolution and the rise of the factory system, child labour was attractive both to manufacturers and to parents seeking their children's earnings. Many working class children were employed in local factories, but factory work left one day in the week free, which made possible the Sunday school movement. The movement was associated particularly with Robert Raikes (1736-1811), a newspaper owner in Gloucester, and this movement soon succeeded in catching the public eye. The Sunday schools experienced a rapid increase in numbers — the number of Sunday-school pupils in Britain was 250,000 in 1787, but this figure rose exponentially; in 1818, it was 425,000; by 1833, it had risen over 1,500,000; by 1851, it reached about 2,600,000; and in 1911, it amounted to over 6,000,000, which was equivalent to about three-quarters of working class children aged between 5 and 15 (Barnard, 1961: 10, Snell, 1999: 126).

Sunday schools shared common features with charity schools in terms of curriculum, teaching methods and reading material (see Appendix 4.1). In particular, as with the charity schools, religious instruction and reading remained as essential parts of the curriculum in Sunday schools and, in some schools, writing and arithmetic were available to older pupils who had already learned to read. Originally, Sunday school teachers were paid a small fee, but they were replaced by voluntary teachers as the movement progressed. Both kinds of school played significant roles in the history of education in England. For one thing, they acted as a precursor of the present universal elementary education in England; particularly, through the Sunday school, 'the idea of universal education was first conceived possible' (Smith, 1931: 60). It is a historic irony in England that an early elementary school system began to develop through the motive of philanthropic charity for the poor, before state intervention in education.

In terms of HILs, more significant is that religious education and the three Rs began to develop as an institutional curriculum through these schools for the poor. Since state education started in the nineteenth century, religious education in state schools had been consistently controversial. Nonetheless, from the early nineteenth century, the Anglican influence was typically been demonstrated in ‘the National Society’s work, the Anglican training colleges, the opposition to the school boards, the demand for increased financial aid for denominational schools at both the elementary and secondary levels’, and culminated in taking ‘the acceptance in 1944 of compulsory Christian religious worship and instruction in all state schools’ (Evans, 1975: 10). Since then, religious education has still managed to survive as part of the compulsory curriculum in schools until now.

With regard to the three Rs, it is worth noting that in the eighteenth century there were also many who opposed the education of the poor for the fear of destroying a hierarchical social order, believing that ‘the only way to preserve it was to deny education to the poor’ (Neuburg, 1971: 2). This atmosphere at the time prevented both the charity school and the Sunday school from catering for all ranges of the three Rs. However, this situation began to change with the development of the cheap monitorial system in the early nineteenth century, which made it possible ‘for the churches to establish considerable numbers of day schools providing instruction in religion but also in the three Rs’ (Murphy, 1971: 4).

The establishment of voluntary day schools in the early part of the nineteenth century was one of the most important educational developments in England. The majority of these schools were administered by religious societies, of which the leading two were the National Society representing the Church of England and the British and Foreign Schools Society representing non-conformists. The monitorial system in the early nineteenth century operated in these voluntary day schools. Together with Sunday schools, voluntary day schools became a central form for providing an elementary education in the nineteenth century. As with Sunday schools, religious education and three Rs were a core part of the curriculum in the voluntary day schools, and still remain the essential part of the current English primary curriculum. As we shall see, the three Rs were heavily emphasised under the Revised Code of 1862, and their HILs have been continually seen in subsequent policies such as the core subjects in the

4.1.2. Early experiences of state control: curricula and examinations

The Revised Code of 1862: payment by results

In the early nineteenth century, Sunday schools and voluntary day schools, which made a great contribution to shaping a national system of elementary education, were spread only through the efforts of voluntary bodies in alliance with churches, but without state involvement. In terms of political philosophy, the laissez-faire philosophy prevalent at this time also militated against state intervention in education in that, under this philosophy with an emphasis on individual freedom and a free market, the state's roles were strictly limited to the defence of the territory, the maintenance of law and order and the saving of public money. In the first few decades of the century, there were a few state gestures²¹ towards its involvement in education. However, it was in the early 1830s that for the first time an amount of public money for education was subscribed by the state: in 1833, the annual grant of £20,000 was first approved by Parliament to assist 'the erection of school buildings', which increased to £30,000 in 1839 (NC, 1861: 20).

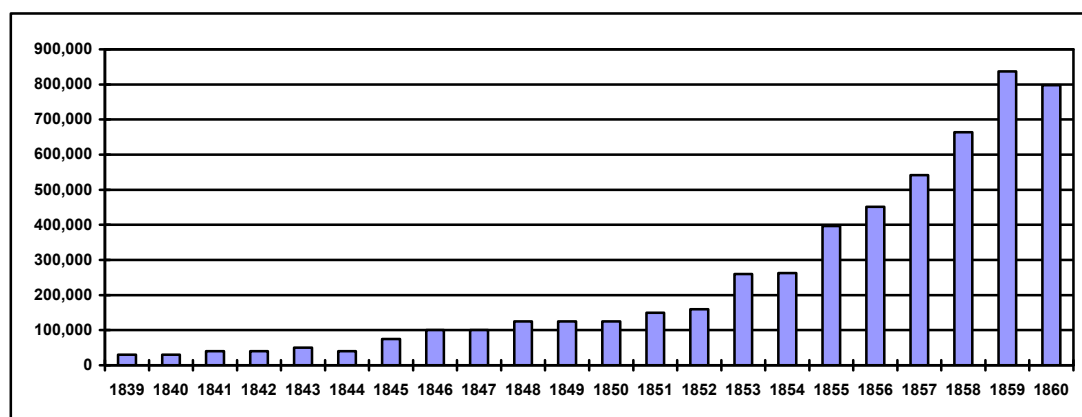
Initially, all of these grants were distributed through the channel of the National Society and the British and Foreign School Society, which screened applications for assistance on behalf of the Treasury. Further, voluntary day schools receiving grant money were neither inspected nor controlled by the Treasury regarding the curriculum and the appointment of staff. In this situation, the need to supervise the spending of the annual grants was increased, which led to the establishment in 1839 of both the CPCE and HMI. Despite the introduction of state supervision and the need for financial stringency after the expense of the Crimean War, as Figure 4.1 demonstrates, the amount of money spent on education²² continued to increase, particularly in the 1850s, from £125,000 in 1850 to £836,920 in 1859. Moreover, elementary education

²¹ These include the Health and Morals of Apprentices Act (1802), Whitbread's Parochial Schools Bill (1807), Parliamentary Select Committee (1816), Brougham's Parish Schools Bill (1820), and Roebuck's Education Bill (1833).

²² Before the Revised Code of 1862, grants awarded by the CPCE were mainly used for the erection of college and school buildings, the training of teachers, the maintenance of elementary schools, school inspection, and the purchase of books and apparatus (NC, 1861: 17).

in state-assisted schools was revealed by several inspectors' reports as having considerable shortcomings (NC, 1861: 242-266).

Figure 4.1 Parliamentary annual grants, 1839-60



Source: NC (1861: 20), Mann (1862: 71)

In this situation, the Newcastle Commission was appointed in 1858 ‘to enquire into the present state of popular education in England’ (NC, 1861: 1). In 1861, the commission produced a six-volume report, and recommended that more financial assistance should be provided to aid previously unassisted schools in the poorer areas by the replacement of block capitation grants, with local rate-aid channelled through a new framework of county and municipal boards. On the other hand, the commission found that elementary subjects such as the three Rs tended to be neglected by teachers, who were focusing most of their attention on the older children and non-essential subject matter, and that HMI’s inspection was covering only about half of the pupils in elementary schools. To improve this situation, the commission made a recommendation concerning the principle of ‘payment by results’ that:

There is only one way of securing this result, which is to institute a searching examination by a competent authority of every child in every school to which grants are to be paid with the view of ascertaining whether these indispensable elements of knowledge are thoroughly acquired and to make the prospects and position of the teacher dependent, to a considerable extent, on the results of this examination.

(NC, 1861: 157)

Robert Lowe, head of the ED from 1859 to 1864, paid attention to this recommendation, which eventually became part of the Revised Code of 1862 (CPCE, 1862a). This code brought a new system of payment by results, merging the existing various grants into a single payment to the school managers. In terms of a curriculum policy, this code had great significance in that for the first time in the history of English education a rigid state control of the curriculum, along with the use of payment by results, started with this code. Through the code it was first attempted to define and enforce educational standards with a strict emphasis on the three Rs (see Appendix 4.2). The code specifically stipulated the content of the elementary curriculum narrowly in terms of the three Rs, together with plain needlework for girls. In addition, this was, as Sylvester (1974: 69) puts it, ‘the origin of standardised tests of scholastic attainment’ in as much that pupils were to be assessed in accordance with Standards I-VI and a schedule of examinable work laid down by the code.

After the code came into effect, the curriculum of the elementary school was largely determined by the regime of payment by results. Payment by results²³ was an economic market-driven system of accountability, which strictly related state grants for elementary education to pupils’ attendance and attainment. Under the code, each pupil could earn the school the sum of twelve shillings (CPCE, 1862a: 8): four shillings per pupil was paid according to the average number in attendance throughout the year, while a further eight shillings could be earned by successful examination performance in the three Rs. Along with the code, HMI became a key institutional agent for this policy through its main task to annually examine the registers and proficiency in the three Rs of all pupils over six years in state-assisted schools, which now had to earn their grant.

Undoubtedly, the payment by results system had a marked influence on practice. Annual examinations compelled both pupils and teachers to comply with its demands, and the curriculum was confined largely to the three Rs with grant earning considerations. As Richards (1998: 58) puts it, this system was ‘successful in

²³ Similar schemes of payment by results were in place before 1862: the pupil-teacher system of 1846 was associated with payment by results under which the salaries of the pupil-teachers and their teachers depended on the yearly examination; in the late 1850s, the DSA also employed a similar scheme by which science and drawing teachers could receive a bonus for meritorious answering by their pupils in annual examinations (Sylvester, 1974; Rapple, 1994).

discouraging initiative and in developing habits of obedience, docility and passivity – in teachers as well as in pupils’. Indeed, at the developing stage as a modern profession, teaching had to experience rigid state control through the obligatory curriculum and state grants rather than becoming autonomous.

When introducing the code, Robert Lowe asserted that ‘if it is not cheap, it shall be efficient; if it is not efficient, it shall be cheap’ (Evans, 1975: 25). This system proved cheaper in terms of governmental saving – parliamentary grants continued to decrease from £813,441 in 1861 to £636,806 in 1865 (Sylvester, 1974: 82). However, this reduction trend did not last too long. From the mid-1860s onwards, the parliamentary grant began to increase, largely due to changes in successive codes and the great expansion introduced by the 1870 Act which replaced hitherto mere state assistance with direct state provision for elementary education. With successive modified codes, governmental grants became available to other subjects in various areas (Richards, 1998: 57); by the 1880s these included class subjects such as history, geography and grammar, specific subjects such as agriculture, chemistry and literature, and everyday science. By the end of the nineteenth century they were further expanded to Latin, mechanics, zoology, chemistry, gardening, singing and recitation.

In 1895, the payment by results system was abolished by the then Secretary of the ED, George Kekeovich (Tropp, 1957: 130). Nonetheless, central government still retained its control of the elementary school curriculum, but the curriculum was prescribed in general terms, leaving its more detailed content at the hands of individual local authorities, schools and teachers to cater for local requirements. This reined control was legally based on a series of elementary education codes and mandatory for all elementary schools receiving public funds. The 1904 Code (BoE, 1904a) and the 1905 Handbook of Suggestions (BoE, 1905b) opened a new era for the elementary schools and their teachers (Evans, 1975: 76). From that point, elementary education escaped the old concept of a charity service for working class children alongside a stress on individual interests and abilities, character building, and moral training, and teachers began to have more freedom and responsibility in the field of curricula and method together with the revised role of HMI.

In 1926, the existing elementary code was replaced by a more compact one. This new code, known as Grant Regulations No. 8, no longer dealt with the various subjects of the curriculum – it just required that ‘the secular instruction in a school must be in accordance with a suitable curriculum and syllabus framed with due regard to the organisation and circumstances of the school or schools concerned’ (Section 10a). The new code was followed by the revised Handbook of Suggestions, with the statement that ‘it is not possible to lay down any rule as to the exact number of the subjects which should be taken in an individual school’ (BoE, 1927b: 38). The state control of the elementary school curriculum initiated by the 1862 Code came to an end through the 1926 Code, and the vague prescriptions remained in place, along with successive editions of the 1927 Handbook of Suggestions, until the passing of the 1944 Education Act.

Grammar tradition and new BoE Regulations

Until 1944, the curriculum of English secondary education²⁴ had developed on the basis of two traditions flowing from grammar schools and elementary schools, respectively. The major tradition was associated with the former schools. In the nineteenth century, there were a variety of fee-paying independent schools, such as endowed grammar schools (including the so-called great ‘public schools’), which were regarded as the preserve of the upper or middle classes and enjoyed a strong connection with Oxford and Cambridge Universities. They provided an education for their pupils until at least 14 years of age, and most of them charged fees by the last quarter of the century (Smith, 1980a: 155). For public schools such as Winchester and Eton, dating back to medieval times, Latin was a dominant subject from the outset and formed the classical curriculum with the inclusion of Greek in the sixteenth century. From the seventeenth century, the non-conformist academies began to provide practical and useful subjects such as English, French, mathematics, science, history and geography, but the public schools were successful in sticking to their overwhelmingly classical curriculum until the eighteenth century, largely due to ‘their endowed status and the universities’ inertia’ (Lawton, 1973: 86).

²⁴ The term ‘secondary education’ was not generally used until the close of the nineteenth century, and the terms ‘secondary’ and ‘grammar’ were officially considered as synonymous until 1944 (Evans, 1975: 43:276).

By the beginning of the nineteenth century, grammar schools were criticised for not preparing pupils for the modern world. Nevertheless, until the latter part of the nineteenth century, their curriculum was mainly humanistic; the traditional classical curriculum was being challenged by English studies, but Latin and Greek, along with a little history and geography, were still dominant for most pupils. Relatively little attention was paid to scientific, commercial or artistic subjects (Smith, 1980a: 156). However, it was also in this latter part of the century that these schools were subject to public enquiries through the three major secondary commissions of Clarendon (1864), Taunton (1868) and Bryce (1895), which helped the advent of a national system in English secondary education.

The second tradition of the secondary school curriculum, which was more scientific, practical and commercial than the humanistic tradition of the middle class schools, came from elementary schools for working class pupils in the nineteenth century. Along with the expansion in education after the 1870 Act, there emerged an increasing need for the further education of abler working class children over 12 years. In this situation, elementary schools began to provide a secondary-type education for their older pupils, organising them as separate parts. These parts for post-elementary education became known as 'higher grade schools' and 'schools of science'. The Sheffield School Board was in the van of the development of the higher grade school in 1880, and other school boards soon followed their example. Conversely, the development of these schools was encouraged by some governmental policies. In 1853, the Department of Science and Art (DSA) was set up to facilitate science and art schools and classes (DSA, 1854: x). In addition, in 1882, the government introduced a new Standard VII applying to older pupils beyond 12 years (ED, 1882: 27).

Along with the public grants issued to these schools, the DSA began to wield its influence on the curriculum of schools of science and art after establishing a comprehensive set of regulations by 1895 under the Directory with Regulations (DSA, 1895). Under the regulations, there were five compulsory subjects – chemistry, physics, mathematics, practical geometry and drawing – which should be dominant in the timetables, with a total minimum allocation of thirteen hours per week. Furthermore, a growing interest in the humanities can be seen in the statement that not

less than ten hours had to be allocated to ‘other subjects’, of which one language and literary or commercial subject should be included (DSA, 1895: 33). From 1897 the DSA’s grants became available to the grammar schools (DSA, 1897: 3), and the grant attraction led to ‘some modification to the humanistic bias of many traditional secondary schools’ and, accordingly, a somewhat similar appearance between the two curricula (Smith, 1980a: 156).

At the turn of the century, a major change in the administrative framework of secondary education was made by two Acts. The Board of Education Act of 1899 integrated the existing three central institutions for education, the ED taking charge of the elementary schools and the higher grade or higher top elementary schools, the DSA giving grants to science schools or classes and the Charity Commissioners caring for the endowed schools, into a single central body of the BoE. This Act was followed by the Education Act of 1902, which launched a state system of secondary education with the replacement of the existing school boards, school attendance committees and technical instruction committees by some three hundred LEAs. Under the 1902 Balfour Act, the Part II LEAs were empowered to use rate-aid for the support and development of ‘other than elementary’ education (i.e. secondary, teacher training, technical and adult education). However, the new state system of secondary education was established largely on the basis of the grammar school tradition – the county and county borough authorities established their own county grammar schools or converted their higher grade schools and pupil-teacher centres to these grammar schools on a fee-paying basis (Evans, 1975: 67).

Along with the two Acts, between 1901 and 1904, new regulations (BoE, 1901a; 1902a; 1904b) were established to regulate a new, broader form of secondary school, replacing the old Directory of the DSA. The 1904 Regulations, particularly, are of great significance in terms of curricular development. With the introduction of these new regulations, curricular priorities shifted from the practical and quasi-vocational curriculum²⁵ dominant in Division A schools, which succeeded the higher grade schools and schools of science, towards a liberal and general curriculum after 1904

²⁵ After the 1902 Act, vocational and technical curricular were ‘put on a separate limb in the central schools, which were higher elementary schools for the purposes of administration, and in the junior technical schools’ (Goodson, 1987: 15).

(Smith, 1980a: 158). It was clearly stated in the regulations that ‘the instruction must be general’ to receive grants (BoE, 1904b: 7). Under the regulations, grammar (secondary) schools were required to provide a curriculum based on a minimum four-year course of general instruction commencing at about twelve years of age (BoE, 1904b: 17). The regulations also laid down the content of the curriculum and the time that should be spent on each part with regard to the subjects of the general course:

The Course should provide for instruction in the English Language and Literature, at least one Language other than English, Geography, History, Mathematics, Science and, Drawing, with due provision for Manual Work and Physical Exercises, and, in a girls’ school, for Housewifery. Not less than $4\frac{1}{2}$ hours per week must be allotted to English, Geography, and History; not less than $3\frac{1}{2}$ hours to the Language where only one is taken, or less than 6 hours where two are taken; and not less than $7\frac{1}{2}$ hours to Science and Mathematics, of which at least 3 must be for Science. The instruction in Science must be both theoretical and practical. Where two Languages other than English are taken, and Latin is not one of them, the Board will require to be satisfied that the omission of Latin is for the advantage of the school.

(BoE, 1904b: 18)

The influence of the 1904 Regulations was long-standing. There was little change between the 1904 and 1935 Regulations in terms of secondary school subjects (see Appendix 4.3), and state control of the secondary school curriculum continued with the 1935 Regulations remaining in force until 1944 when the Butler Act was legislated. In terms of HILs, state control over the elementary and secondary curriculum, which had been instituted in the early era governments, was completely revived in the Thatcherite governments with the introduction of the National Curriculum, and central control over the curriculum was strengthened under the New Labour governments with more diversified curricular policies. In particular, the secondary curriculum, stated in the 1904 Regulations, is significant in that it functioned as a prototype for the 1988 National Curriculum.

External examinations and SSEC

In addition to central regulations, the external examination system is of importance in that it can affect the whole process of the school curriculum – external examinations play key roles in assessing pupils’ learning and selecting candidates for subsequent stages of education or for employment; as for teachers, external examinations can be seen as an assessment of their efficiency and performance as well as of pupils; and, most importantly, external examinations can be strong determinants of curricula at the classroom level and can also be strong policy instruments for governments’ educational reform programmes. External examinations can occur at every stage of formal education such as for entry to secondary schools, during and at the end of secondary schools and at university. It is not difficult to understand that the examinations during and at the end of secondary schools can be the most influential determinants of secondary school curricula.

In the second half of the nineteenth century, examinations became popular in English society. In 1853, a competitive examination began to be used to select candidates for the Indian civil service, which was gradually introduced into the appointments for the home civil service from 1870 (Montgomery, 1965; Roach, 1971). In 1858, the Oxford and Cambridge Locals and the University of London Matriculation examinations, by which the secondary schools and their curricula first became affected, came into existence after the success of the ‘Exeter experiment’ in 1857. Originally, university bodies introduced examinations to meet their own matriculation requirements without any consideration for the schools. However, as time went on, they began to develop ‘school leaving certificate examinations that took account of the school context and were associated with a system of inspection’ (Evans, 1975: 283).

It is worth noting that, from its inception, the external examination system for secondary schools grew up in the hands of universities without state control. University examining boards increased to eight in number by the early years of the twentieth century. However, they worked independently without any central coordination or arrangements for equivalence with other professional examinations, which the then secondary schools used for professional qualification. Facing a range of examinations, the secondary schools had to struggle not only to meet the needs of a general education for all pupils, but also to prepare their pupils for the specific

requirements of particular examining bodies. Pupils also suffered from an excess of examinations to the extent that unfortunate pupils ‘might have to take an external examination every year for four successive years’, since in the Locals there were three stages for examinations such as Preliminary, Junior and Senior, and the London Matriculation was taken a year after Senior Locals (Phillips, 1933: 324).

This situation was described as ‘a state of chaos’ by the Consultative Committee on Examinations in Secondary Schools (BoE, 1911b: 1). In 1917, in response to the situation, the BoE established the ‘school certificate’ (SC) and ‘higher school certificate’ (HSC) examinations, taken usually at 16-plus and 18-plus respectively and coordinated by the Secondary Schools Examinations Council (SSEC). To secure the certificate, pupils had to succeed in a minimum of five subjects chosen from certain groups including one subject from each of three groups such as the humanities, foreign languages, and mathematics and science. Initially, the school certificate examination was intended to streamline external examinations by the use of two levels – the ‘pass’ level as a certificate of school-leaving for pupils going straight into employment and the ‘credit’ level as a matriculation certificate for university entrants. However, the Spens Report concluded that ‘the attempt to combine the two different objectives in one examination has been disastrous’ since the credit level was considered as ‘a superior kind of school certificate with its own special value in the eyes of employers and the general public’ (BoE, 1938: 258).

The most conspicuous feature in the development of the external examinations is that, as external examinations became prestigious, they began to wield a huge amount of power over the school curricula. As the Taunton Commission (TC) (1868: 322) put it, success in the examinations became the ‘be-all and end-all’ of school life. In terms of teachers, the British Association for the Advancement of Science (1903: 438) pointed out in its report that the examinations ‘confine teachers to old ruts and discourage all attempts at improvement’ and ‘the teacher considers not what is best for the boys but what the examiner will ask’. More than two decades after the introduction of the school certificate, it was concluded, in the following statement from the Norwood Report, that this situation was still going on:

At present the examination dictates the curriculum and cannot do otherwise; it confines experiment, limits free choice of subjects, hampers treatment of subjects, encourages wrong values in the classroom.

(BoE, 1943: 31)

Even after the introduction of the school certificate, university examining bodies²⁶ were still dominant in the operation of the external examination system, and the BoE acted ‘as a coordinating authority, so as to secure, as far as possible, that the standards adopted by the examining bodies are approximately equal’, together with an investigation of the examinations from time to time (Phillips, 1933: 324). In terms of HILs, as we shall see, the two types of external examinations, instituted in the early era governments, had a continual effect as a prototype for subsequent external examination regimes such as the GCE and GCSE.

In addition, it should be noted that the early era governments intervened in the external examinations through the SSEC. Initially, the council was composed of twenty members, besides a chairman appointed by the BoE, from three groups: nine representing the examining bodies, five LEA representatives and six representing the teachers (Montgomery, 1965: 132). The government strengthened its control over the external examinations by changing the membership of the council. In 1936, Circular 1448 (BoE, 1936) increased its membership to thirty with an equal number between the three groups, which consequently reduced university influence exerted through the examining bodies. In terms of HILs, as we shall see, the instituted regime of external examinations coordinated by a council outside the education department continued in subsequent governments.

²⁶ There were eight approved examining bodies in 1933: the Oxford and Cambridge Schools Examination Board (the Joint Board), the Oxford Locals Delegacy, the Cambridge Locals Syndicate, the Northern Universities Joint Board, London University, Durham University, Bristol University, and the Central Welsh University. All these bodies except the last one were directly connected with universities (Phillips, 1933: 324).

4.2. Policies in the Post-War Era Governments

4.2.1. Education Act 1944

Unregulated curriculum

Central control over the school curriculum came to an end with the 1944 Act. This Act did not lay down any stipulations on the curriculum except for religious instruction (see Appendix 4.4). The reasons for the omission of requirements for the school curriculum in the Act were not clear. From a political perspective, it has been argued that Butler did not set down any regulations for the curriculum for fear of future Labour governments using them as a power to control the school curriculum in an explicitly socialist way (White, 1975: 22-39). In contrast, Raison (1976: 76) argues that the abandonment of the secondary regulations in the legislative process of the Act provably resulted from an administrative oversight of the need to continue the regulations. Lawton (1980: 19) points out that ‘no one at the centre knew what kind of curriculum should be offered when secondary education *for all* was introduced’. Whatever the reasons might be, one thing significant in terms of the curriculum and teaching is that this Act led consequently to the era of the unregulated curriculum without any statutory regulations.

Professional autonomy under the post-war partnership

As mentioned in Chapter 2, the 1944 Act provided a basis for the post-war partnership. Under Section 1 of the Act, the new Minister had substantial statutory powers; his duty was to ‘promote the education of the people of England and Wales and the progressive development of institutions devoted to that purpose, and to secure the effective execution by local authorities, under his control and direction, of the national policy for providing a varied and comprehensive educational service in every area’. However, the responsibility for curriculum planning, including the dates of terms, length of the school day, and secular instruction, was delegated to LEAs. It was laid down in Section 23(1) of the Act that:

In every county school and, subject to the provisions hereinafter contained as to religious education, in every voluntary school except an aided secondary school, the secular instruction to be given to the pupils shall, save in so far as may be otherwise provided by the rules of management or articles of government for the school, be under the control of the local education authority.

After the Second World War, most LEAs struggled to deal with the major problems of buildings and staffing. Accordingly, the responsibility for the school curriculum was assumed by the schools themselves. This situation eventually led to an era in which teachers could enjoy their professional autonomy in the curriculum, although there were constraints such as examination syllabuses, university and other entrance requirements, the advice of local authority inspectors and HMI, pupils' subject choices, the overseeing of governors, and parents. In particular, Lawton (1980: 22) describes the period from 1944 to the beginning of the 1960s as 'the golden age of teacher control (or non-control) of the curriculum', and there were no statutory requirements for the school curriculum throughout the 1970s.

Compulsory religious education

Additionally, the churches had to be considered as key partners within the framework of the 1944 Act. As we have seen, the churches, particularly the Church of England, played a major role in providing an elementary education from the eighteenth century onwards. Under the 1944 Act, the church schools were renamed 'voluntary schools', which had been called 'non-provided schools' since the 1902 Act. The 1944 Act named three categories of voluntary schools and specified the financial obligations of the managers and governors, through which the churches continued to retain a certain amount of control over the appointment of staff and the curriculum. In particular, religious instruction and daily collective worship, for the first time, became statutory obligations. It was laid down in the Act that 'the school day in every county school and in every voluntary school shall begin with collective worship on the part of all pupils in attendance at the school... religious instruction shall be given in every county school and in every voluntary school' (Section 25).

4.2.2. Reorganisation of primary and secondary education

Tripartite system of secondary education

The 1944 Act laid the foundation for the public education system today by entirely reorganising the structure of the public education statutory system. It was stipulated in the Act that ‘the statutory system of public education shall be organized in three progressive stages to be known as primary education, secondary education, and further education’ (Section 7). Primary education was defined as ‘full-time education suitable to the requirements of junior pupils’ (Section 8). However, this Act did not lay down the age of transfer from infant to junior education. Instead, it just defined the compulsory school age as ‘any age between five years and fifteen years’ (Section 35). Although its structure was not fully described in the Act, primary education was first recognised as a statutory stage in the national system of education, replacing previous elementary schools providing basic education for children aged 5 to 14 with primary schools providing for all children between the ages of 5 and 11.

In addition, under the 1944 Act, secondary education was defined as ‘full-time education suitable to the needs of senior pupils’ (Section 8). The longstanding drive in British society for ‘secondary education for all’ was finally achieved by this 1944 Act, which provided a free compulsory secondary education for all children of ages 5 to 15. However, the Act made no mention about the types of secondary school. This reflects class-based socio-economic situations. At this time, there were two different movements towards secondary schooling – one for common secondary schooling for all children, and the other for segregated secondary schooling. During the first three decades of the twentieth century, the former movement united teachers’ organisations in ‘promoting at first multilateral schools and then comprehensive schools with a common curriculum’ (Reynolds et al., 1987a: 5). The latter movement was connected with government commissions and their reports (BoE, 1926b, 1938, 1943b). From the reports, the BoE was concerned with developing ‘a tripartite system of secondary education: separate grammar, technical and modern schools with different curricula for different types of children’ (Lawton, 2005: 34).

Ten days before the publication of the Norwood Report, the coalition government issued a White Paper (BoE, 1943a) in which the view of the tripartite system was

accepted. However, during the period of eight months before the 1944 Education Bill received the royal assent, there had been much debate on the Bill and the final form had no mention of types of secondary school. The Butler Act permitted 'pluralism' in the structural modification and experimentation of secondary schooling, so for the people concerned, this Act could be understood and utilised as a support either for selection in secondary schooling or for comprehensive schooling (Batteson, 1999: 7). Accordingly, the interpretation of the Act and the choice of types of secondary school were left in the hands of LEAs.

From the outset, the Butler Act was interpreted in line with the tripartite system in secondary schools (see Appendix 4.5). The post-war baby boom (see Figure 2.1) and the raising of the school leaving age in 1947 led to an increasing number of pupils in schools, and this increase largely resulted in the growth of maintained secondary schools. In 1946, maintained secondary schools consisted of modern, grammar and technical schools, without any comprehensive schools. Not until 1950 did the small number of pupils in comprehensive schools appear in statistics. By the end of the tenure of the 1951-64 Conservative governments, the tripartite system gradually changed into a bipartite system in which grammar schools and secondary modern schools became the dominant model, with pupils in technical schools decreasing in number after 1960.

Comprehensive reorganisation

From the mid-1960s there were substantial changes in secondary education policy in Britain, especially with the Wilson government commencing its office in 1964. In its 1964 manifesto, Labour pledged that it would 'get rid of the segregation of children into separate schools caused by 11-plus selection', reorganising secondary education 'on comprehensive lines' (Labour Party, 1964). This was not surprising given the fact that there was an increasing movement around the time against the eleven plus exam and that Labour tried to enhance equality in education. Following the 1944 Act, each LEA developed its own selection procedure in accordance with the tripartite system, but this was largely dependent on both IQ tests, questioned in terms of their fairness and reliability, and tests of attainment in maths and English. Furthermore, it was consistently found that there was substantial social class bias between the intakes to the three types of school in the tripartite system; middle class children were dominant

in the grammar schools, while working class children were found mainly in secondary modern schools (Floud et al., 1956; Douglas, 1964).

In this situation, under the Keynesian intervention strategy, the government took a significant step towards so-called ‘comprehensive reorganisation’, publishing Circular 10/65 with a bold objective ‘to end selection at eleven plus and to eliminate separatism in secondary education’ (DES, 1965a: para. 1). Nevertheless, it was also stated at the end of the circular that ‘they [the Government] do not seek to impose destructive or precipitate change on existing schools’ (DES, 1965a: para. 46). Local authorities were not forced to go comprehensive; they were just ‘invited to choose a scheme and start the planning process’ (Benn and Chitty, 1996:9). It was disappointing for many supporters that the Labour government did not take any actions to compel the LEAs to go fully comprehensive, even when Labour won the election in 1966 by a large majority.

Nonetheless, the comprehensivisation policy made some noticeable progress. The number of pupils in comprehensive schools started to increase rapidly from 239,619 in 1965 to 2,982,441 in 1977 (see Appendix 4.6). Even the period when Margaret Thatcher as the Conservative Education Secretary from 1970 to 1974 withdrew the policy and limited change in comprehensive schools, they were still increasing, passing the halfway mark in total population of secondary pupils. Many secondary modern schools were changed into comprehensive schools in line with the substantial decrease in pupils. In addition, this policy led to a large decrease in pupils in maintained grammar schools from 1965 onwards.

The advent of middle schools in the late 1960s was also in accordance with this policy. The 1964 Act made it possible for the LEAs to change their school systems from the two-tier system of primary and secondary schools to the three-tier of first or lower, middle and upper schools, permitting transference at ages other than 11 and providing limited experimental status to the middle school. Circular 10/65 also presented the three-tier system as an option for the LEAs to choose comprehensivisation. Some LEAs with schools too small to become orthodox comprehensives chose to divide their secondary schools on the basis of age, and the 1967 Plowden Report supported

12 as the age of transfer. In this context, middle schools grew rapidly throughout the 1970s.

4.2.3. Plowden Report: child-centred primary curricula and teaching

Until 1944, the primary curriculum was constructed on the basis of the subjects which remained almost unchanged from the previous period – in infant schools, the curriculum was largely composed of activities covering reading, writing, arithmetic, dramatic play, scripture, art and craft, music, physical training and large-scale construction; in junior schools, it largely consisted of subjects such as scripture, English, arithmetic, history, geography, art, craft, music, nature study and physical training (Richards, 1998: 62). After the 1944 Act, the primary curriculum went away from the political concerns of central government until 1963 when Edward Boyle asked CACE, established under Section 4 of the 1944 Act as an advisory body, ‘to consider primary education in all its aspects and the transition to secondary education’ (DES, 1967a: 1). In 1967, CACE, chaired by Lady Plowden, produced the first official report on primary education since the war. The Plowden Report symbolically demonstrated its philosophical basis through the opening lines, declaring that:

At the heart of the educational process lies the child. No advances in policy, no acquisitions of new equipment have their desired effect unless they are in harmony with the nature of the child, unless they are fundamentally acceptable to him.

(DES, 1967a: 7)

Clearly, the report gave its strong support to the philosophical tide of progressivism in primary education at the junior as well as the infant level, employing a broad child-centred approach. In its part five, the report was in favour of progressive²⁷ notions on curricula and teaching methods such as non-streaming, the open-plan approach, the experimental grouping of children, the integrated day, and individualised learning procedures. The child-centred approach to teaching, which was taken forward by such

²⁷ In respect of progressive teaching, the terms, ‘developmental’ (Blyth, 1965), ‘craftsman teaching’ (Gracey, 1974) ‘individualistic’ (Ashton, 1975), ‘informal’ teaching (Bennett, 1976), ‘process’ teaching (Blenkin and Kelly, 1981) and child-centred (Entwistle, 1970) tend to be interchangeably used along with the generic term of progressive (Sugrue, 1997: 6).

writers as Pestalozzi, Froebel, Dewey and Kilpatrick, was not unique to the Plowden Report; it had been already been seen in the 1931 Hadow Report (BoE, 1931b: para. 75).

By the mid-1960s, an English primary school revolution along progressive lines drew much attention from the media and later from many foreign educationalists, but it soon became considered overestimated, very much a myth. In reality, as Richards (1998: 63-64) puts it, 'primary education was only just beginning to emerge from the influence of the elementary school tradition; the curriculum remained dominated by the teaching of reading, writing and mathematics (and for some pupils intelligence)'. The progressive perspective of child-centredness that consistently grew in many revolutionary schools since Hadow was finally accepted as 'the central tenet of educational practice' by the Plowden Report (Blackstone, 1967: 293). With this progressive perspective, the report described an ideal primary school as follows:

A school is not merely a teaching shop, it must transmit values and attitudes. It is a community in which children learn to live first and foremost as children and not as future adults...It lays special stress on individual discovery, on first hand experience and on opportunities for creative work. It insists that knowledge does not fall into neatly separate compartments and that work and play are not opposite but complementary.

(DES, 1967a: 187-188)

In this school, teachers were asked to 'provide an environment and opportunities which are sufficiently challenging for children and yet not so difficult as to be outside their reach' and to 'rely both on their general knowledge of child development and on detailed observation of individual children for matching their demands on children's stages of development' (DES, 1967a: 196). One thing to note is that the Plowden Report, with its emphasis on child-centredness, acted as a strong argument and support for a major shift of the framework of teaching practice from traditional to progressive teaching (see Appendix 4.7). Following the report, 'a new generation of open-plan schools was created without classroom doors, and a new generation of teachers was trained to promote the ethos of progressive teaching styles' (Francis and Grindle, 1998: 274).

With regard to the curriculum, CACE stressed that ‘children’s learning does not fit into subject categories’ (DES, 1967a: 203). However, while it dealt with the possible content of the primary curriculum, it largely relied on a traditional subject categorisation of religious education, English, modern languages, history, geography, mathematics, science, art and craft, music, physical education, and sex education (DES, 1967a: 203-261). In the late 1970s, HMI provided an alternative framework for the primary curriculum in its report (HMI, 1978) in which the content of the curriculum was analysed in terms of skills and attitudes, language and literacy, mathematics, science, aesthetic and physical education, and social studies. However, the legal basis of the primary curriculum, with no statutory regulations, did not change in successive governments throughout the 1970s.

The Plowden Report met with severe criticisms; its sociological and developmental assumptions and its advocacy of progressive methods were attacked by a series of Black Papers (Cox and Dyson, 1969a, 1969b, 1970, 1975) and by other critics such as Blackstone (1967) and Simon (1985). In Bennett’s (1976) study, progressive educational styles were not seen as so attractive to teachers or as being more effective than traditional methods. However, as with the 1944 Act, the Plowden Report should be understood in the context of the post-war partnership. The themes addressed in part three of the report include educational priority areas, the children of immigrants and the health and social services, which are in line with the ideals of social justice and welfare based on the post-war social democratic consensus. The report did not envisage any central control over the curriculum and teaching, thereby supporting the post-war partnership between government, LEAs and teachers.

Moreover, it is worth noting that the report encouraged the move for LEAs to abolish the so-called ‘eleven plus examination’ (DES, 1967a: 157). In the tripartite system, established following the 1944 Act, the allocation of pupils to different types of secondary school was dependent on the selection examination at the age of 11. In British society, this eleven plus examination was consistently criticised as bringing about ‘a narrowing of the primary school curriculum, an excessive emphasis on the acquisition of measurable skills and rigid streaming’ (DES, 1967a: 153). After LEAs were invited through Circular 10/65 to submit plans for reorganising their secondary schools on a non-selective basis, CACE’s recommendation for the abolition of the

eleven plus examination facilitated this comprehensive reorganisation, which subsequently relieved primary schools from examination pressure.

4.2.4. Secondary curricula and teaching

Three major CACE reports on secondary education

Regarding the school curriculum, the 1944 Act just placed a duty on LEAs ‘to contribute towards the spiritual, moral, mental and physical development of the community by securing that efficient education throughout those stages (of primary, secondary and further education) shall be available to meet the needs of the population of their area’ (Section 7). Accordingly, following the Act, secondary schools also came into a situation in which their teachers had the freedom to determine the curriculum without any statutory regulations²⁸, and developed along the lines of the tripartite system advocated by the reports of Hadow, Spens and Norwood. It was a consistent recommendation in these reports that there should be three different kinds of curriculum corresponding to three different types of secondary school for three different categories of pupils. This rationale also had the effect of acting as guidance on ‘teachers’ thinking on curriculum’ for many years following the Act (Lawton, 1980: 21).

During the 1951 to 1964 Conservative governments, criticisms of the tripartite system for its class bias and unfair selection by the eleven plus examination were widespread. In this situation, CACE produced three major reports on secondary education. The terms of reference for each report cover different age groups or areas of secondary education (see Appendix 4.8). The 1954 report found that children from the unskilled working class obtained below half as many grammar school places as they would statistically be expected to (MoE, 1954: 34), and that ‘from the children of parents in professional or managerial occupations at one extreme to the children of unskilled workers at the other there is a steady and marked decline in performance at the grammar school, in the length of school life, and in academic promise at the time of leaving’ (MoE, 1954: 56). This class bias in grammar schools was confirmed by the

²⁸ Shortly after the Act, the Council for Curriculum Reform argued a common curriculum for secondary schools through its report, *The Content of Education* (1945), but it was not accepted.

Crowther Report (MoE, 1959a), which expressed some support for ‘comprehensive experiments but on the assumption that the tripartite system would continue for most children’ (Lawton, 2005: 57).

The Crowther Report addressed far-reaching themes – school organisation, curriculum, sixth-form programmes, university admissions, further education, external examinations, and school staff – for its main recommendations such as the raising of the school leaving age to 16 and the provision of compulsory part-time education up to 18 in county colleges, envisaged by the 1944 Act. The urgent need for the raising of the school leaving age, and for a demanding programme for the 13-16 age group, were reaffirmed by the Newsom Report (MoE, 1963a), which focused on ‘half the pupils’ who were of below average ability and largely in secondary modern schools. However, as Evans (1975: 189) puts it: ‘the Newsom Report avoided the really important issue of whether the selective system should be condemned in favour of comprehensive secondary schooling’.

These three major reports by CACE can be understood as a limited drive of Conservative governments for secondary education for all within the tripartite framework. However, one thing notable is that, although most recommendations in them were not accepted by the governments due to other policy priorities, these reports had a thematic influence on the related or subsequent policies, particularly in respect of the secondary school curriculum and external examinations.

SSEC and changing examinations

By the time secondary curricula central regulations were abolished by the 1944 Act, the control of examinations had already become a main concern in the policy arena. In 1947, the SSEC consisted of thirty-one members besides the chairman – five from the Ministry, eight LEA representatives, eleven representing the teachers, six from the universities, and one from the Central Welsh Board (MoE, 1946). As a result, all representatives of the examining bodies were removed and the MoE became more directly involved in the council by its own nominees. In 1961, the MoE’s nominees were increased to eight by the reconstitution allowing for a larger representation from non-selective schools (MoE, 1962a: 18).

It was already recommended by the Norwood Report that the school certificate examination should be abolished and replaced by an internally-derived examination under the control of teachers (BoE, 1943b: 140). From a historical perspective, however, a more significant recommendation was that for the transitional period of seven years ‘the examination should become what is known as a “subject examination”, that is to say, an examination in which pupils would take whatever subjects they wished without restriction as to minimum number of subjects or “groups” of subjects’ (BoE, 1943b: 47). Debates on the new structure of external examinations followed the report, and in 1947 the reconstituted SSEC put forward its first report, recommending a compromise measure of the new ‘general certificate of education’ (GCE) in coexistence with internal assessments (MoE, 1947). In 1951, the school certificate was replaced by the GCE Ordinary level (O-Level) alongside the replacement of the higher school certificate by the GCE Advanced level (A-Level).

The O-Level was the single subject type of examination (see Appendix 4.9) whereby the influence of the group examination was removed; schools and teachers, therefore, were given much more control over the curriculum. Originally, it was designed for the top 20 per cent of pupils by ability, who were largely in grammar schools and independent schools, and the needs of pupils lower in the ability range, largely in secondary modern schools, were intended to ‘be met by arrangements for systematic internal examinations, perhaps with some degree of external assessment, and possibly also objective tests, accompanied by the extensive use of school reports’ (MoE, 1960a: 7).

However, external examinations had already become so entrenched in British society that this single-subject type of examination encouraged many candidates who were not in the originally intended ability-range to take the examination; GCE candidates from secondary modern schools increased from 4,068 in 1953 to 16,787 in 1958, despite the decline in the number of 15 and 16 year-olds during the period (MoE, 1959a: 76). To meet this newly growing demand for examinations, during the 1950s there emerged a move to establish a new kind of lower level examination, along with the new Associated Examining Board, the widespread use of the College of Preceptors’ certificate and the proliferation of other examinations for 15-year-olds.

The need for a lower level examination was already expressed by the Crowther Report with a statement that:

There remains another group – consisting of about one-third or rather more of pupils in modern schools – for whom external examinations below the level of the G.C.E. may serve a useful purpose, and official policy should be modified to recognise this.

(MoE, 1959a: 88)

In 1958, the SSEC appointed a committee, chaired by Robert Beloe, to ‘review current arrangements for the examination of secondary school pupils other than by the General Certificate of Education examination’ (MoE, 1960a: 1). In 1960, the committee produced a report (MoE, 1960a). The new examinations recommended by this Beloe Report were for sixteen-year old pupils who were in the next 20 per cent below the top quintile; they were to be on a subject and not a group basis; and they were to be organised by regional examining bodies largely controlled by serving teachers (MoE, 1960a: 47-49). Although David Eccles considered the idea of lower-level examination as ‘not a very sound proposal’ (Passow, 1962: 176), the main themes of the report were endorsed by the fourth and fifth SSEC reports on the ‘certificate of secondary education’ (CSE) (MoE, 1961, 1962b). In 1963, the government issued Circular 9/63 (MoE, 1963b) whereby the establishment of the CSE examination was finally accepted.

The first CSE examinations were nationally held in 1965 under the control of fourteen regional examining boards established in England and Wales. The new CSE examination can be seen as a further step towards more teacher control over the curriculum and examination – teachers consisted of about two thirds of the members of the council for each regional board; teachers had a considerable majority on most examination committees; and each regional subject panel was composed of about fifteen teachers (Whalley, 1969: ch.3). Moreover, Modes 2 and 3 gave teachers a great deal of freedom in operating the examination (see Appendix 4.10).

The Schools Council (SCCE)

From the beginning of the 1960s, there emerged a drive toward regaining central control over the school curriculum. In 1960, debating the Crowther Report in the House of Commons, David Eccles emphasised the need for government intervention in ‘the secret garden of the curriculum’ (Chitty, 1988: 326). In line with this drive, the Curriculum Study Group (CSG) was established in 1962, without prior consultation with those with educational interests. It was composed of HMIs, administrators and educational experts from outside to ‘identify, analyse and publish accounts of curriculum development which might be of help and interest to the schools’ (Kogan, 1978: 63).

However, the CSG was soon followed by the sheer hostility of teacher associations, who saw it as the government’s apparent attempt to control the content of the curriculum. In March 1964, after reviewing the need for new cooperative machinery in the field of the school curriculum and examination, the Lockwood Committee recommended the establishment of the Schools Council for Curriculum and Examinations (SCCE), which was also to take over the duties of the SSEC from September 1964 (MoE, 1964). Interestingly, although the Lockwood recommendations were very liberal and progressive, they were fully accepted and implemented without delay under the Conservative government, and the SCCE officially began its work on 1 October 1964.

For teachers, there was room for the new council to be seen as a new institutional constraint to their autonomy in the curriculum in as much that the curriculum, which had been untouched and disconnected from the main concerns of the SSEC focusing on examinations since 1917, now placed itself centre stage with the new council created by integrating the CSG and the SSEC. In this sense, the argument of Kogan (1978) and Lawton (1980) – that by the 1960s the end of the era of educational harmony and consensus was in sight with a swing back to central control – is understandable. However, as Chitty (1988: 327) states: ‘there is much evidence for thinking that teacher autonomy and educational harmony were not really under serious threat in the 1960s’. Indeed, the SCCE still operated on the basis of the post-war partnership. The SCCE adopted as its doctrine the important recommendation that ‘the membership of the governing council and its major committees should contain a

majority of teachers' (Bell and Prescott, 1975: 6). In addition, its stated general principles were 'to uphold and interpret the principle that each school should have the fullest possible measure of responsibility for its own work, with its own curriculum and teaching methods based on the needs of its own pupils and evolved by its own staff' (SCCE, 1968: 29).

In these respects, Caston (1975: 27) sees the SCCE as a well-organised body for curriculum development, and describes its four important characteristics as having the perspectives of pluralism and professionalism as follows: central/local government partnership; professional teacher control; avoidance of authority; and restriction of activity to the what and how of schooling – the curriculum. The SCCE chose the main topics which should be given priority, and a series of publications on those topics were produced following a good deal of enthusiastic work (see Appendix 4.11). However, by the late 1970s it was being criticised for various reasons. Lawton (1980: 72-74) summarises these reasons as follows: the SCCE was concerned with curriculum development associated with progressive methods at a time when a return to traditional discipline and the three Rs was increasingly suggested; good materials produced at considerable cost were not effectively disseminated to teachers; and it became too identified with teachers' unions and teacher politicians, largely due to the lack of full-time permanent appointments at its top level, without sufficient accountability for their participation. As a response to these criticisms, the SCCE was subject to a review of its organisation during 1977-1978. In 1978, this review led to major changes in its committee structure and its programmes of work.

Under the regime of the SCCE, teachers continued to keep their professional autonomy in the curriculum, but they also had to endure domination of the curriculum by external examinations. In such a situation, from its start in 1964, the SCCE along with the Standing Committee for University Entrance (SCUE) paid considerable attention to the curriculum and examinations in the sixth form. This growing attention to the sixth form came to the fore for two reasons – the existing two- or three-subject A-level course was not seen as ideal for many pupils among the increasing number of sixth-formers and the early and narrow specialisation in sixth-form work became an increasing concern (Mortimore et al., 1984: 56).

In 1969, the joint SCCE/SCUE working party presented the Q and F proposals, which included a broader five-subject curriculum with candidates taking up to five subjects at Q (qualifying) level after one year in the sixth form, and then studying in greater depth up to three subjects at F (further) level in the second year of the sixth form. These proposals were rejected by the governing SCCE council because of the potential problem of students taking three public examinations in three successive years. In 1973, the joint working party presented the N and F proposals, which were based on a five-subject curriculum examined at two levels, but in the same second year three N (normal) and two F (further) level examinations (SCCE, 1973a; 1973b). However, despite a four-year research and survey programme, these proposals were finally rejected in March 1979 by Shirley Williams, the then Secretary of State, with an announcement that A-levels would not be abolished due to the lack of sufficient agreement on the proposals (Lawton, 1980: 106).

Along with the drive toward reforming examinations in the sixth form, the SCCE exerted a great deal of effort to reform examinations at 16 plus. As we have seen previously, the GCE coexisted with the CSE from 1965, secondary-school pupils being divided into these two types. This dual system met with criticism alongside the growth of comprehensive schools on a large scale and the proposed raising of the school leaving age in 1972/3. In the meantime, the SCCE undertook detailed work in its committees and made a suggestion in 1970 that there should be a single system of examining at 16 plus. In 1971, it presented plans for the new common examination at 16 plus, which would cater for pupils in the top 40 per cent of the ability range, with those in the quintile below that range taking isolated subjects (SCCE, 1971). In 1976, the SCCE, with sufficient confidence, recommended that the GCE O-Level and CSE should be integrated into a single examination system. In 1978, the Waddell Committee, appointed in 1977 to oversee the possibility of this recommendation, reported with a new target date of 1985 that the single examination system was feasible and desirable (DES, 1978b). Eventually, the SCCE's effort led to the introduction of the General Certificate of Secondary Education (GCSE) in 1986.

4.3. Policies in the Thatcherite Governments

4.3.1. IILs

The Great Debate: changing partnership and growing accountability

It has been widely accepted among scholars that 1976 was a significant moment in the history of education policy and debate in England (Batteson, 1997; Chitty, 1998; Phillips and Harper-Jones, 2002). In his speech at Ruskin College in October 1976, James Callaghan called for a public debate on education, which was followed by the so-called Great Debate in 1976/77. In the post-war partnership framework, central government minimised its role, leaving the responsibility for the content and quality of education in the hands of teachers. However, the need for a change in this framework was clearly expressed in Callaghan's Ruskin speech, with a new emphasis being placed on the accountability to parents and industry:

To the teachers I would say that you must satisfy the parents and industry that what you are doing meets their requirements and the needs of our children. For if the public is not convinced then the profession will be laying up trouble for itself in the future.

(Callaghan, 1976)

The main content and context of this speech reflected the socio-economic situations that demanded rigid 'accountability' for the effectiveness and performance of schooling around the time when the post-war consensus was disintegrating. Under the economic crisis (see section 2.2.2), the educational budget, increased throughout the 1960s, had to be examined in terms of its value for money. In addition, there was a growing conviction that 'Britain's economic malaise was attributable to a mismatch between industrial needs and school performance' (Batteson, 1997: 368). British education became exposed to a number of criticisms, especially from the press and media. With a series of Black Papers, the political Right consistently criticised comprehensive education and progressive primary teaching methods as causing a decline in educational standards. In 1976, anxiety about progressive teaching in

primary schools culminated with the Auld Report on the William Tyndale Junior and Infant Schools (Auld, 1976). The Yellow Book, leaked out to the press before the Ruskin speech, also acknowledged these widespread criticisms, stating that:

Yet the press and the media, reflecting a measure of genuine public concern, as well as some misgivings within the teaching profession itself, are full of complaints about the performance of the schools. Why is this? Has something gone wrong? If so, how is it to be put right?

(DES, 1976a: 5)

Callaghan sought an answer as to how he could ‘put it right’ from the report (DES, 1977b) produced by the Taylor Committee, which was asked in January 1975 to ‘review the arrangements for the management and government of maintained primary and secondary schools’ (DES, 1977b: 1). The committee recommended that governing bodies should consist of an equal representation of teachers, LEAs, parents and the local community, including employers, and assume responsibilities for the general direction of the school (DES, 1977b: 111-119). This recommendation was based on the notion that schools should be more accountable to the needs of their partners, particularly parents and the local community, who had been neglected before. From the Ruskin speech and the Taylor Report, the emphasis on parental choice and market forces in the field of education, which became prevalent in the incoming Thatcherite governments, had already sprouted up under the Labour governments in the 1970s. In this respect, Simon (1991: 431) argues that the Callaghan government ‘paved the way, or provided the soil for the surge of the radical right – for the Thatcherite domination of the 1980s’.

Emphasis of the core curriculum and monitoring system: towards central control

In his speech, Callaghan raised the need for a ‘core curriculum’ and an efficient monitoring system for national standards. Following the Ruskin speech, the DES produced a background paper in which four main subjects were chosen for debate, employing the term ‘core curriculum’: the curriculum 5 to 16; the assessment of standards; the education and training of teachers; and school and working life (DES, 1977a). The core curriculum, with the commonly-mentioned five subjects of English, religious education, mathematics, science and modern languages in the 1970s, is

significant in that it acted as an intermediate form towards a National Curriculum, with its concept being further developed in two documents of the early Thatcher government (DES, 1980b; 1981a). The need for central control over the curriculum and teaching was clearly expressed in the Yellow Book as follows:

Nor need there be any inhibition for fear that the Department could not make use of enhanced opportunity to exercise influence over curriculum and teaching methods: the Inspectorate would have a leading role to play in bringing forward ideas in these areas and is ready to fulfil that responsibility.

(DES, 1976a: 25)

The Great Debate culminated in July 1977 with a Green Paper (DES, 1977c) showing the government's intention to review education in schools. The government duly issued Circular 14/77 (DES, 1977d) whereby the LEAs were asked to assemble relevant information and report the results to the government. The report on the review (DES, 1979), published after Thatcher came into power, revealed that many LEAs were insufficiently informed about what went on in their schools. In this context, Holt (1983: 20-21) sees this circular as 'a device which managed to make the LEAs look as if they were failing in their duties, and thus allowed the DES to take the initiative'.

The increasing emphasis of the monitoring system for maintaining national standards from the mid-1970s is another indication of a move towards central control over curriculum and teaching. In particular, the establishment of the Assessment of Performance Unit (APU) reflects this move well. The APU was formally announced in a White Paper (DES, 1974a) addressing the educationally disadvantaged, tactfully avoiding resistance by the teaching profession (Lawton, 1980: 51), with the terms of reference to 'promote the development of methods of assessing and monitoring the achievement of children at school, and to seek to identify the incidence of under-achievement' (DES, 1974a: 16). The need for an efficient monitoring system was emphasised again by the Bullock Report (DES, 1975b: 513).

Along with this recommendation, the APU consistently strengthened its position in the educational scene. The main role of the APU was related to assessment by

sampling, and a background paper referred to the APU as the main body for ‘a national system of assessment’ (DES, 1977a: 8). The 1977 Green Paper confirmed the position of the APU as the main national testing body concerned with pupils’ standards, with a programme of national school assessments being launched in 1978 by the APU (DES, 1977c: 42). Institutionally, the APU was established within the DES, which is quite different from the status and organisation of the SCCE. The growth of the APU from the mid-1970s is sharply contrasted with the situation of the SCCE, dwindling away from the main policy arena. As Lawton (1980: 65) puts it, the APU can be understood as ‘an example of the DES seeking to exert some controlling influence over certain aspects of the school curriculum’. In a broader context, it can be argued that the Great Debate ‘reflected a trend towards defining and limiting the boundaries of teacher autonomy’ (Bates, 1984: 199).

4.3.2. Curricular policies in the first and second Thatcher governments

Legislation and increasing parental choice

The Major government summarised the main policy directions which had led educational changes in the 1980s, the period of his predecessor’s governments, into five themes of quality, diversity, increasing parental choice, greater autonomy for schools and greater accountability (DfE, 1992c: 2). Soon after Thatcher came into power in 1979, some actions guided by the New Right ideologies were taken by the new government. The 1979 Education Act allowed the LEAs to maintain selective systems by repealing Labour’s 1976 Education Act, which had required LEAs to create plans for comprehensive secondary education. The 1980 Education Act embodied the notions of privatisation and parental choice by instituting the assisted places scheme, requiring LEAs and governing bodies to provide parents, who were to be represented on the governing bodies of all schools, with information about the school to help their choice. The government recommended in a Green Paper (DES, 1984b) that parents elected by fellow parents should be given the right to form a majority of the school governing body. In the Education (No.2) Act 1986, governors were required to publish an annual report for parents and to hold an annual parents’ meeting to discuss it.

Core curriculum

However, by 1987 there had been comparatively moderate changes in policies on the school curriculum and teaching. Initially, it was the concept of a core curriculum that the government – under the raising central control strategy – was so concerned with, which required the allocation of time spent on key subjects such as English, mathematics, science and modern languages (DES, 1980b: 5-7). However, this idea met with severe criticisms. Moreover, HMI employed a different concept in its report (DES, 1980c). The DES made a concession with *The School Curriculum*, stating that:

The Secretaries of State do not suggest minimum times which should be devoted to these subjects. Any suggested minima might too easily become norms, or be interpreted too rigidly. It is for the local education authorities to consider, in consultation with the teachers in their areas, whether to suggest minimum time allocations in these subjects, as broad guidance for schools.

(DES, 1981a: 14)

This policy stream reflects the configuration of different approaches to curriculum models developed by the DES and HMI at this time. The DES and its civil servants employed a narrow subject-based approach, seeing a common curriculum for all schools as a limited core of compulsory subjects. In contrast, the three HMI Red Books (DES, 1977e; 1981b; 1983c) show that HMI developed broader concepts such as ‘areas of experience’, ‘access’ and ‘entitlement’ for a common compulsory curriculum, rejecting the DES concept of a narrow subject-based core curriculum. As Chitty (1993: 10) puts it, HMI thought that ‘all pupils regardless of ability should have access to an “entitlement curriculum” viewed as a broad synthesis of the vocational, the technical and the academic’. The final Red Book provided the HMI’s conclusive view, reached after more than a decade of curriculum debate:

The conviction has grown that all pupils are entitled to a broad compulsory common curriculum to the age of 16 which introduces them to a range of experiences...Any measures which restrict the access of all pupils to a wide-ranging curriculum or which focus too narrowly on specific skills are in direct conflict with the entitlement curriculum envisaged here.

(DES, 1983c: 25-26)

From *The School Curriculum* it was clear that the Thatcher government would maintain, for the time being, the partnership framework constructed by the 1944 Act, with the concept of a core curriculum being somewhat drawn back. It was stated in the document that ‘curriculum policies should be developed and implemented on the basis of the existing statutory relationship between the partners’ (DES, 1981a: 2), with responsibilities for curriculum policy and control left to the LEAs. This policy stream continued in subsequent circulars such as Circular 6/81 (DES, 1981c) and Circular 8/83 (DES, 1983e).

Disbandment of the Schools Council: a decrease in professional autonomy

In September 1981, Keith Joseph replaced Mark Carlisle as Secretary of State. After *The School Curriculum*, the government’s attempt to determine what was taught in schools by the introduction of the core curriculum became weakened. However, during his period in office from 1981 to 1986, there emerged a number of other policies which marked the government’s strategy to raise central control over the curriculum and teaching. In 1984, as discussed, CATE was established, through which state intervention in the content and structure of ITT was institutionalised. However, in terms of the school curriculum and teaching, a more notable institutional change was the disbandment of the SCCE in 1984. Following the 1977/78 review, the SCCE was reviewed again in March 1981 – at a time when the Thatcher government was involved in tightening state expenditure and the growth in money supply to reduce inflation (see section 2.3.2) – and the Trenaman Report (DES, 1981d) gave the SCCE a reasonably clean bill of health in October 1981.

However, on 22 April 1982, Keith Joseph announced in the House of Commons his intention to disband the SCCE and replace it with two new bodies, with the only given reason that a single body was ‘not well suited to carry out both functions, carrying out research and keeping under review curriculum and examinations’ (Haywood, 1986: 187). On 31 January 1984, the SCCE was replaced by two smaller and cheaper bodies, the Secondary Examinations Council (SEC) and the School Curriculum Development Committee (SCDC). Lawton (1984: 10) points out the importance of the decision to disband as follows:

This very centralist decision was important for two reasons: it separated curriculum from examinations, contrary to professional opinion going back at least to the Norwood Committee (1943); and members of the two committees would be Secretary of State nominees not representatives of any of the organizations that had made up the Schools Council – a further potential increase of power at the centre.

Since Callaghan's Ruskin speech, attacks from industry and parents, as well as from the government on teachers and schools, became more frequent and fierce. As the 1980s progressed, it became an implicit but prevalent view that the whole teaching profession was idle and ineffective. The abolition of the SCCE, as Coulby (1989: 9) put it, was 'a clear indication that the voice of the profession was no longer to be heeded in curricular and examination policy at national level'. Furthermore, as we shall see, the creation and expansion of the MSC, the regular appraisal of teachers instituted by the Education (No.2) Act 1986 and the sheer criticism from people and the media for the long-running pay dispute and strikes of 1984-1986 showed a clear move towards the demise of the era of teachers' professional autonomy.

Increasing central control by financial measures

The government strategy of raising central control over the curriculum was coupled with policies aiming to change the financial relationship between central and local government. The financing of local government in Britain was largely dependent on three major sources: user charges, local rates and the rate support grant (RSG) from central government. Following the Queen's Speech in May 1979, announcing firm fiscal policy against a long-term growth in public expenditure (see section 2.3.2), a new system for distributing the RSG, the so-called block system, was introduced in 1980 by the Local Government Planning and Land Act 1980, and further developed by the Local Government Finance Act 1982. Additionally, with new criteria such as grant-related expenditure assessments and grant-related poundages (DoE, 1980, 1982, 1983, 1984), expenditure targets and grant penalties 'were designed to put pressure on all authorities to make cuts, and provided a means whereby grant was removed more heavily only from those authorities which had failed to meet their required level of cuts' (Gibson and Travers, 1986: 1).

However, this new system and subsequent changes were not successful in reducing aggregate overspending or influencing individual over-spenders. Finally, the government sought the means to exert direct control through the introduction of the Rates Act 1984, which empowered the government to set limits to the rates which English and Welsh authorities could levy. This rate-capping policy, applied to eighteen authorities in the first year of 1985/86, was significant because it might bring about direct reductions in local government's major services such as personal social services, housing and education. In terms of educational services, this policy was seen at the time as forcing 'a further reduction in pupil-teacher ratios, a contraction of the curriculum, a halt to the already inadequate integration of students with special educational needs into schools and a reduction in maintenance standards', let alone more severe reductions in non-statutory educational services (McVicar and Atkinson, 1985: 127). The Education (Grants and Awards) Act 1984 was also in line with this growing central control over local government by changing financial relationships in that it enabled the government to allocate education support grants (ESGs), not extra but money withheld from RSG, to LEAs for specific 'innovations and improvements' purposes on the basis of bids.

4.3.3. Education Reform Act 1988 and the National Curriculum

Education Reform Act 1988

It is the 1988 Act that provided an integrated landscape of the Thatcher government's marketisation and raising central control strategies (see Appendix 4.12), i.e. this Act was regarded as 'the most important and far-reaching piece of educational law-making for England and Wales since the 1944 Education Act' (Maclure, 1988: 1), encouraging market forces of choice in education on the one hand, and strengthening central control of education on the other. One thing to note is that this Act replaced the long-standing educational framework of social democratic consensus, formed by the 1944 Act, with a new framework of market forces of choice, giving unprecedented power of central control to the Secretary of State. Kenneth Baker's opening speech, as the successor to Keith Joseph, in the second reading debate on the Education Reform Bill in the House of Commons, reflects well the view of the Conservative government regarding this Act.

Our education system has operated over the past 40 years on the basis of the framework laid down by Rab Butler's 1944 Act, which in turn built upon the Balfour Act of 1902. We need to inject a new vitality into that system. It has become producer-dominated. It has not proved sensitive to the demands for change that have become ever more urgent over the past ten years. This Bill will create a new framework, which will raise standards, extend choice and produce a better-educated Britain.

(Haviland, 1988: 2)

As Miliband (1991: 3) put it, the central innovation of this Act was 'the attempt to create a formal "market" in education'. In this educational market, parents, and at other times employers, but not pupils, tended to be treated in the eyes of the New Right as consumers whose freedom of choice should be maximised. The New Right also saw LEAs and partly state schools and their teachers, instead of central government, as producers whose intervention should be minimised for the benefit of consumers and of market efficiency. In addition, the idea of vouchers supported by the neo-liberal right in the early 1980s as an effective means to introduce market competition in education was somewhat transformed in the 1988 Act.

Under the Act, parents' freedom to choose schools was greatly increased by the policy of open enrolment (Sections 26-32), which was helped from 1992 by the publication of the resulting 'school performance tables' for secondary schools (DfE, 1992b). The new City Technology Colleges (CTCs), financed partly by private capital, independent of LEA control, provided a new choice in deprived inner-city areas. LEAs were further attacked by the introduction of GM schools; now, any secondary schools and the larger primary schools with the simple majority of parents voting for such a step could seek to opt out of LEA control and receive their funding direct from central government.

Above all else, the introduction of LMS probably played a key role in promoting market competition in education, involving 'a new and ingenious scheme for financial delegation whereby local authorities would be required to distribute funds to their primary and secondary schools by means of a weighted, per capita formula' (Chitty,

2004: 52). Under LMS, LEAs were required to transfer many of their powers to the schools' governing bodies, and schools had to struggle to attract as many pupils as possible in order to survive, therefore competing with one another. The Thatcher government's consistent pursuit of curbing local authority powers culminated in the abolition of the Inner London Education Authority following the abolition of the Greater London Council in 1985. These reforms mentioned above were consolidated under the Major government by the Education Act 1993.

National Curriculum: a revival of central control

Until 1985, the government took a hesitant stance toward introducing a National Curriculum. In *Better Schools*, which outlined the future directions of a wide range of educational reforms, the government intended not to 'introduce legislation affecting the powers of the Secretaries of State in relation to the curriculum' (DES, 1985a: 12). This stance, however, began to change soon after Kenneth Baker took office as Secretary of State in May 1986. Baker was a strong supporter of the idea of a National Curriculum with a centrally-determined framework. In December 1986, he announced plans for the introduction of a 'national core curriculum' by legislation within a third Thatcher administration (Lawton and Chitty, 1988: 1).

Although there were controversial arguments about this idea of a centrally determined National Curriculum, even among the representative Conservative think-tanks, Kenneth Baker continued developing the framework of a National Curriculum, issuing a series of press releases (DES, 1987b; 1987c; 1987d). In May 1987, the introduction of a 'national core curriculum' became pledged as the first major educational reform in the Conservative manifesto (Conservative Party, 1987: 18). In July 1987, a consultation document (DES, 1987e) was duly published after the winning of the 1987 general election. This document listed ten foundation subjects, including the three core subjects of English, maths and science, to be taken by all pupils during their compulsory education. The main proposals suggested in the document were incorporated into the 1988 Act.

It was the introduction of the National Curriculum (see Appendix 4.13) that reflected well both the raising central control strategy and the effect of HILs. It was a revival of central control over the school curriculum with a framework very similar to those of

1904 and 1935. The National Curriculum consisted of ten foundation subjects which were almost the same as those subjects stipulated in the Regulations for the Secondary Schools of 1904 and 1935. Essentially, as Aldrich (1988: 23) points out, it can be seen as ‘a reassertion of the basic grammar school curriculum devised at the beginning of the twentieth century’. In a sense, state control over the curriculum was strengthened more under the new regime of the National Curriculum in that now these compulsory subjects became applied to primary schools as well as secondary schools, and each subject at each stage now had to be described in greater detail in terms of its objectives (attainment targets) and content (programmes of study).

From an ideological perspective, the regime of the National Curriculum was a compromise result between two groups of new-right conservatives, that is to say, neo-conservatives who saw the traditional academic subjects taught in public and grammar schools as essential to restore Victorian heritage and values, and neo-liberals who thought the school curriculum should be left in the hands of market forces to meet the needs of customers. However, the two groups of new-right conservatives with different views on the curriculum reached an agreement on the introduction of the centrally controlled National Curriculum through a rationale that comparative assessment arrangements, such as league tables of performance, which would ensure an educational market for parents to freely compare and choose providers, would be possible only when schools were restricted to follow an identical National Curriculum. In this sense, Ross (2000: 60) pointed out that Kenneth Baker ‘took this neo-conservative subject-based line on the curriculum, and tied it to the neo-liberal position of establishing a marketplace in education’.

From an institutional perspective, the control of the Secretary of State over the curriculum strikingly increased alongside the establishment of new educational institutions. Under Sections 14-15 of the 1988 Act, all aspects of the curriculum for maintained schools and of the examinations and assessment were to be kept under review by two new bodies, the National Curriculum Council (NCC) and the School Examinations and Assessment Council (SEAC), replacing the existing two bodies of the SCDC and SEC. Now the Secretary of State had such powers as to appoint all members of the NCC and SEAC, establish a complete National Curriculum, revise that curriculum when necessary or desirable, and specify, in a statutory order

attainment target, programmes of study and assessment arrangements for each foundation subjects.

Implementation of the National Curriculum

When the consultation document (DES, 1987e) was published, subject working groups also began to be established to draw up proposals for attainment targets and programmes of study in each foundation subject. Working groups for mathematics and science were set up in July 1987, a further two for English and technology in April 1988, a further three for history, geography and modern foreign language between January and August of 1989, and another three for music, art and physical education in June 1990 (NCC: 1990a: 13). Through the work of these working groups, each foundation subject received specified attainment targets and programmes of study by the end of 1991.

Implementation of the National Curriculum began in September 1989 with the introduction of three core subjects for pupils aged 5, and of mathematics and science for pupils aged 11, and implementation for all pupils in all foundation subjects was scheduled to take until about 1997 (see Appendix 4.14). However, the National Curriculum had some limitations which prevented its smooth implementation. First of all, no rationale or philosophy for it and its ten foundation subjects were provided in the Act. The HMI's 'areas of experience' approach, further developed by its new curriculum series, *Curriculum Matters* from 1984 to 1989, found little favour with the Conservative government. Section 1(2) of the 1988 Act just states that it entitles every pupil in maintained schools to a 'balanced and broadly based curriculum' which:

- (a) promotes the spiritual, moral, cultural, mental and physical development of pupils at the school and of society; and
- (b) prepares such pupils for the opportunities, responsibilities and experiences of adult life.

In this situation, as Chitty (1993: 16) states, each of the subject working groups 'packed everything that it considered important into its own curriculum' without agreed principles and objectives, making foundation subjects 'a prescriptive, content-specific national syllabus'. Accordingly, the National Curriculum became overloaded

as time progressed. Moreover, there was a considerable deficiency in the integration with regard to policy directions. The National Curriculum was introduced as a national framework for the school curriculum. From the start, however, it was not applied to independent schools, and modified versions were applicable to CTCs. Successive Thatcherite governments consistently attempted to make the National Curriculum compatible with other policies in order to allow greater differentiation. This double stance towards curricular policies was highlighted in a White Paper, published under the Major government, with an encouraging statement that:

Diversity and parental choice allow schools to develop in different ways. In particular, they encourage schools to play to their strengths. Some schools stress an all-ability curriculum; others, in addition to the National Curriculum, specialise in one or a small number of subjects.

(DfE, 1992c: 9)

As for teachers, the introduction of the National Curriculum meant a clear declaration of the end of their long-possessed autonomy on decisions about what should be taught, learned and assessed in schools. Facing this political control, teachers tried to recover their influence on the curriculum by asserting the 'broad and balanced curriculum', which the 1988 Act had promised with the National Curriculum subjects, being described as part of the 'whole curriculum'. After many delays, during the term of John MacGregor as Secretary of State, the curriculum guidance paper *The Whole Curriculum* (NCC, 1990b) was published, followed by further guidance papers with five cross-curricular themes (NCC, 1990c; 1990d; 1990e; 1990f; 1990g).

However, this drive toward developing a whole curriculum with far-reaching cross-curricular themes was dropped soon after MacGregor was replaced by Kenneth Clarke in November 1990, with a concentration on the ten foundation subjects. In addition, Kenneth Clarke commissioned an inquiry into primary school teaching methods, arguing for a return to streaming based on the belief that primary schools were becoming too child-centred. This led to the so-called 'three wise men' report (DES, 1992a), which put emphasis on more subject teaching, the teacher as an instructor rather than a facilitator and the basic skills of literacy and numeracy.

On the other hand, teachers were concerned about National Curriculum tests. As we have seen, an assessment carried out at the four key stages under a ten-level scheme was to be integral to this curriculum. In January 1988, the Task Group on Assessment and Testing (TGAT) published its reports (DES, 1988b; 1988c), from which the initial National Curriculum assessment arrangements were established. Under the new assessment regime, teachers had to judge pupil achievement against a large number of very detailed statements of attainment. This assessment regime caused ‘administrative overload’ and led many teachers to ‘frustration’ (NCC/SEAC, 1993: 19).

In 1991, mandatory testing through standard assessment tasks (SATs) for core subjects began with seven-year olds, after a trial year in 1990. Teachers’ opposition through their unions to the National Curriculum tests was rapidly expanded across subjects during the period between the first trials for fourteen-year olds in 1992 and mandatory tests for them in 1993, along with an effective teacher boycott organised for 1993 (Ross, 2000: 79). In this situation, there was an urgent review of the National Curriculum by Sir Ron Dearing. As a result of this review (NCC/SEAC, 1993, SCAA: 1993), the National Curriculum became slimmed down to make it more manageable for schools.

4.3.4. Post-14 curriculum with new national qualification frameworks

New Vocationalism

The national GCE and CSE examination systems dominated the school curriculum, but at the same time they played a key role as a national qualification framework for pupils on the academic track, i.e. GCE O-levels and low-status CSEs for 14-16-year-olds, and GCE A-levels for post-16. This qualification framework continued to exist when Thatcher came into power in 1979. Shortly after Callaghan’s Ruskin speech, with its emphasis on the curriculum meeting the needs of industry, some schemes such as the Unified Vocational Preparation (UVP) and Youth Opportunities Programme (YOP) appeared to provide vocational training for young people who left school at 16 without training. And the early 1980s saw the striking appearance of a systematic attempt to shift 14-19 education towards more explicit economic priorities

along with a publication setting out national objectives for the future of industrial training (DE, 1981: 3).

In response to these objectives, there emerged three initiatives in the period 1982-85 (see Appendix 4.15) – the Technical and Vocational Education Initiative (TVEI), the Youth Training Scheme (YTS), and the Certificate of Pre-vocational Education (CPVE). Among these, TVEI had ‘the longest impact, leaving a legacy of co-operative working between schools and colleges and a raised profile for work-focused learning’ (Lumby and Foskett, 2005: 21). After the Prime Minister’s announcement in November 1982, TVEI started in September 1983 with fourteen LEAs as pilot schemes to ‘explore and test methods of organising, managing and resourcing repeatable programmes of general, technical and vocational education’ (DES, 1991b: 1), and was continuously extended in subsequent years until all LEAs were involved by 1988.

By the mid-1980s, a range of initiatives related to vocational education was in operation. This policy stream, termed the ‘new vocationalism’ (Dale, 1985), reflected socio-economic situations at this time. The rise of these vocational initiatives was a response to the economic recession between the 1970s and the mid-1980s (see Figures 2.2, 2.4), which led to a growing increase in unemployment among all age groups during the period. In particular, rising youth unemployment in this period (Layard and Nickell, 1986: 123) emerged as an urgent economic issue that needed to be addressed by government, along with a demographic estimation that the number of 16-year-olds would reach a peak of 841,000 in 1981 (DES, 1980d: 10). In terms of political ideology, the so called ‘conservative modernisers’, a powerful group of politicians and industrialists, began to exert substantial power in the process of forming education policies (Jones, 1989). They were critical not only of a ‘liberal’ education for disseminating ‘anti-industrial’ values, but also of the rigid distinction in comprehensive schools between high-status academic knowledge and low-status practical training, and asserted a more prominent role for technical and vocational subjects in the secondary school curriculum (Chitty, 2004: 140).

One thing to note here is that throughout the early 1980s this vocational policy stream was led by the training quango of the Department of Employment (DE), the

Manpower Services Commission (MSC). Instead of the DES, the MSC devised and ran the TVEI and YTS, and acted as a key institutional agent in implementing a new set of policies supported by the conservative modernisers, especially when it was headed by David Young between 1982 and 1984. Under the marketisation strategy, the MSC played a key role in introducing market elements into the curriculum development area; the MSC managed its work through a system of bidding for funds against strict criteria, and programmes were delivered by contracts subject to strict external evaluation.

New national frameworks for academic and vocational qualifications

In the development of a qualifications system in England, 1986 marked a significant moment. First of all, in 1986 the GCSE was eventually introduced following proposals in 1978 (DES, 1978b; 1978c), an announcement in 1982 (DES, 1982e) and detailed outlines in 1985 (DES, 1985a). The introduction of the GCSE was significant in that the dual qualifications system for the academic track between the GCE and the CSE became unitary under the new regime of GCSE. Furthermore, in 1986 the vocational policy stream, mentioned above, led to the creation of the National Council for Vocational Qualifications (NCVQ). The DES and DE jointly reviewed the developments and progress in vocational education and training since the 1981 New Training Initiative, and published a White Paper (DES/DE, 1985) in which a review of vocational education, including the current hundreds of vocational qualifications, was announced. In 1986, the De Ville Report (MSC/DES, 1986) concluded that existing vocational qualifications were too confusing, and recommended the establishment of NCVQ. This report was soon followed by a White Paper (DE/DES, 1986) in which the creation of the National Vocational Qualifications (NVQs) to be developed and overseen by the NCVQ was eventually announced.

Hodkinson classifies vocational education on the basis of value positions into traditional and progressive types (see Appendix 4.16), and argues that ‘NVQs incorporate a combination of both vocationalist positions’ (1991: 29); they are progressive in terms of their action planning approaches, modular structure and credits system, while they are traditional in that they are narrow and specific rather than broad and open-ended. However, one thing to note is that, with the introduction of NVQs, a new national qualifications framework with dual tracks, i.e. GCSEs and

A-levels for pupils on the academic track, and NVQs for pupils on the vocational track, was constructed.

In 1991, NVQs were followed by another qualifications track. After the introduction of the National Curriculum and the substitution of the MSC by its retrenched-successor bodies, the Training Commission, the Training Agency and the Training, Enterprise and Education Directorate, the DES, began to take the lead with *Education and Training for the 21st Century* (DES/DE, 1991) in which the new General NVQs (GNVQs), which would offer ‘a broad preparation for employment as well as an accepted route to higher level qualifications, including higher education’ (DES/DE, 1991: 19), were recommended. As a result, with GNVQs nationally introduced in 1993, the national qualifications system came to have a triple-track framework – the academic, general vocational and vocational/occupational tracks (see Appendix 4.17). This growing concern about national qualifications since the early 1980s can be understood as part of a government’s response to growing international competition.

4.4. Policies in the New Labour Governments

4.4.1. IHLs

Choice, diversity and specialisation for higher standards

In *Choice and Diversity*, the concepts of choice, diversity and specialisation rather than selection were identified as the Major government's main policy directions for education. In the document, choice and diversity were regarded as opposite sides of the same coin, since diversity entailed 'a range of choices available to parents' (DfE: 1992c: 10). The meaning of selection and specialisation was differentiated by 'defining selection as giving choice to schools and specialisation as giving choice to parents' (Edwards and Whitty, 1997: 5). The Major government saw specialisation as 'a matter for local needs and deliberations' (DfE, 1992c: 10), and so both selective and non-selective schools could choose to specialise in one or a small number of subjects. These concepts were emphasised for the government's ultimate goal, high standards, and the document clearly stated the means to achieve it: 'high standards will be fostered through testing, specialisation, rigorous inspection and an ever-deepening recognition of the needs of individual pupils' (DfE: 1992c: 5).

Despite the poor take-up of GM status and the lack of enthusiasm for CTCs, the Major government – through this White Paper – continued to encourage schools to become grant-maintained and to build on the work of the fifteen CTCs along with the establishment of technology schools by a network of maintained secondary schools and technology colleges in partnership with business sponsors. The main recommendations in the document were incorporated in the 1993 Education Act, which led to the simplification of the opt-out procedure, the operation of the Funding Agency for Schools (FAS) to administer for GM schools, the introduction of methods to address 'failing schools' identified by Ofsted inspectors, and the replacement of the NCC and SEAC by a new single body, the School Curriculum and Assessment Authority (SCAA).

In September 1994, the specialist schools programme, designed to ‘help schools to develop particular strengths and raise standards in a chosen specialism in partnership with private sector sponsors’, began with a small number of grant-maintained and voluntary-aided schools operating as technology colleges (Ofsted, 2001: 1). In 1995, each maintained secondary school in England became eligible to apply for specialist school designation through open competition. Furthermore, subject specialism was broadened in 1995 to include modern foreign languages, and in 1997 to include sports and arts (Levacic and Jenkins, 2006: 230-231). At primary level, the National Literacy Project and the National Numeracy Project pilot programmes were initiated in 1996, with the involvement of poorly performing LEAs in England (Jones, 2002: 8).

This policy stream was further developed through the 1996 White Paper (DfEE, 1996b). Following the headings of choice, diversity and specialisation, symbolising the government’s policy direction, Major’s Cabinet proposed action on five fronts with a view to encouraging diversity and choice for parents: the encouragement of new grammar schools; greater freedom for schools to select pupils; the encouragement of new GM schools; the development of the specialist schools programme; and the encouragement of a state boarding provision (DfEE, 1996b: 37). This policy stream under the Major government is significant in that it was not substantially changed even after New Labour came into power in 1997. As we shall see, raising standards by increasing parental choice, diversifying and specialising schooling, and intensifying schools inspection through Ofsted were consistent themes in the New Labour policy arena.

Dearing Reports: making the curriculum and qualifications framework flexible

The Dearing Review (1993-95) started with the pragmatic recognition from teacher discontent in 1992/93 that the National Curriculum of ten foundation subjects, outlined by each of their own orders, was overloaded and unmanageable, and should be slimmed down, with more flexibility for teachers. Under this recognition, Sir Ron Dearing, designated chairman of the NCC and SEAC at the time, was asked on 7 April 1993 to review the current National Curriculum and its assessment framework. In December 1993, the final report (SCAA, 1993) was duly produced following its interim report (NCC/SEAC, 1993). The main recommendations made by the final report included:

- Streamlining of the curriculum for 5-14 year olds (key stages 1-3) to allow the equivalent of a day a week for schools to use at their own discretion.
- A reduction in curriculum content 5-14 to be concentrated outside the ‘core’ subjects of English, maths and science.
- Increased flexibility in the curriculum 14-16 (key stage 4) to allow schools to offer a wider range of academic and vocational options.

(Golby, 1994: 95-96)

The recommendations in the report were accepted in full by the government and led to a review by the SCAA of all National Curriculum subjects. As a result of this review, drafts for a new slimmed-down National Curriculum were consulted between May and July 1994. After ratification in Parliament, the new orders were dispatched to schools in January 1995 and officially came into effect as law from August 1995. The Dearing Review is significant in that, although it was performed within the New Right ideology of placing emphasis on the subject-based curriculum and content without changing any compulsory subjects set by the 1988 Act, it initiated a policy stream to make the rigid National Curriculum more flexible. This policy stream continued in the New Labour government, with the structure of the National Curriculum substantially pared down. Another point to note is that the process of text production in this review was led by the SCAA, officially created in October 1994. The policy stream of regulating responsibilities for the school curriculum and its assessment through separate two bodies since the disbandment of the SCCE in 1984 was now changed again.

In particular, the 1993 Dearing Review began to see the 14-19 curriculum, rather than the 14-16 curriculum envisaged in the original National Curriculum, as an effective curricular framework for continuity. This review designated 14 as the age to choose three educational pathways of ‘academic’, ‘vocational’ and ‘occupational’ (SCAA, 1993: para. 5.30-5.41), supporting the triple-track qualifications framework established with the introduction of GNVQs. This view was also seen within the 1996 Dearing Review (SCAA, 1996) in which the three pathways were renamed: ‘A-level and GCSE’, ‘applied education (GNVQ)’ and ‘vocational training (NVQ)’ (SCAA,

1996: 15-16). The 14-19 curricular framework for continuity was further strengthened by the first White Paper examining the 14-19 phase in England (DfEE, 1996c).

According to Hodgson and Spours (1997: 11), the debate about qualifications in the mid-1990s can be categorised into three basic positions – the trackers who support the existing three distinctive qualification tracks; the frameworkers who stress the development of an overarching qualification framework; and the unifiers who support the development of unified systems. In this situation, one of the main purposes of the 1996 review was to ‘increase the coherence of the national qualifications framework, reduce its complexity, and make it more easily understandable by everyone’ (SCAA, 1996: 2). However, Dearing was asked under strict terms of reference to have particular regard for the need to maintain the rigour of A-levels and continue to build on the current development of GNVQs and NVQs (SCAA, 1996: 1). In this situation, Dearing’s recommendations had to picture ‘a weak variant of a framework approach’ (Young, 1997: 38) or ‘a triple-tracked system, but with “linkages” between each of the three tracks’ (Hodgson and Spours, 2003: 18), so maintaining the academic and vocational division in the national qualifications framework, along with the consistent support for the so-called ‘gold-standard’ A-level.

4.4.2. School diversity policy for raising standards

Excellence in schools: New Labour’s framework for schooling

After coming into power, the Blair government, as pledged, quickly abolished the assisted places scheme introduced by the Education (Schools) Act 1997, with the saved funds used to reduce class sizes in primary schools. The government’s commitment to raising standards started with institutional developments – a Standards Task Forces and Standards and Effectiveness Unit were established at the DfEE, and the Qualifications and Curriculum Authority (QCA) was set up in 1997 by merging the SCAA and NCVQ. In July 1997, the government incorporated its 1997 election pledges into its first White Paper, *Excellence in Schools*. This paper addressed the far-reaching themes reflecting government strategies, by setting out the six principles underpinning the overall approach of New Labour to education policy up to 2002:

- Education will be at the heart of government.
- Policies will be designed to benefit the many, not just the few.
- The focus will be on standards, not structures.
- Intervention will be in inverse proportion to success.
- There will be zero tolerance of underperformance.
- Government will work in partnership with all those committed to raising standards.

(DfEE, 1997a: 5)

These principles are important in that they would become a set of guidelines for future policymaking. In particular, the ‘standards not structures’ principle was – to many traditional Labour supporters – a clear betrayal, since for them ‘the ending of academic selection was seen as the priority for reform’ (Fitz et al., 2006: 116). This principle implied that there would be little change in the structure of schooling built previously by the Thatcherite governments. Under this principle, the Blair government allowed the existing 163 grammar schools to decide their fate by parental ballot, instead of closing them by central decision. On the other hand, this paper made some proposals for a new school framework, guaranteeing school diversity for higher standards and setting out eight underlying principles (DfEE, 1997a: 66-67). These proposals were incorporated into the School Standards and Framework Act 1998, whereby schools were designated, from September 1999, as being in one of three categories: community (formerly county), voluntary aided or controlled, or foundation (formerly most grant-maintained) schools. The government’s commitment to raising standards was extended to the inclusion of children with special educational needs through the issuance of a Green Paper (DfEE, 1997d).

School diversity programmes

The government was consistently involved in school diversity through the utilisation of two policy strands – the first by encouraging some existing schooling diversity regimes introduced during the Thatcherite governments for grammar schools, CTCs, many foundation schools with little changed status from GM schools, and specialist schools; the other was by introducing new programmes including Education Action Zones (EAZs), Excellence in Cities (EiCs), Academies and Beacon Schools (see Appendix 4.18). This school diversity policy was in line with government strategies.

New Labour saw this policy as a means to modernise schooling, particularly comprehensive secondary schooling (DfEE, 1997a: 37). In addition, the government used the notion of partnership and specialisation as a main platform for enhancing schooling and social inclusion. All school diversity programmes operated on the basis of partnerships, and many of them encouraged partner schools to specialise in some subjects or areas. In this respect, the government used the term ‘school diversity’ to ‘describe the way in which the education system is structured to enable schools to differentiate themselves’ along with two key principles, ‘specialising’ and ‘collaborating’, which underpinned this school diversity policy (DCSF, 2008g).

In terms of political ideology, the emphasis on partnership can be understood as having a flavour of modernised social democratic consensus in that New Labour utilised the school diversity programmes to raise the educational standards of pupils largely in disadvantaged areas, and that LEAs, which had been much marginalised in the previous Conservative era, were given roles to play as an active partner in the programmes. Nevertheless, this policy was largely dependent on the philosophical framework encouraging both competition between schools and parental choice to raise the standards needed to meet challenges in the global economy. In terms of curriculum, this school diversity policy led to more flexibility in the National Curriculum framework. When EAZs were launched as one of the area-based initiatives, ‘they were offered the possibility of some freedom from the National Curriculum framework’ (Power et al., 2004: 460). Further, academies were encouraged to ‘have a broad, relevant and innovative curriculum, with a special emphasis in one or more areas of the curriculum’ and to ‘be innovative across all aspects of their work, not just the curriculum’ (DfES, 2005d: 6-7).

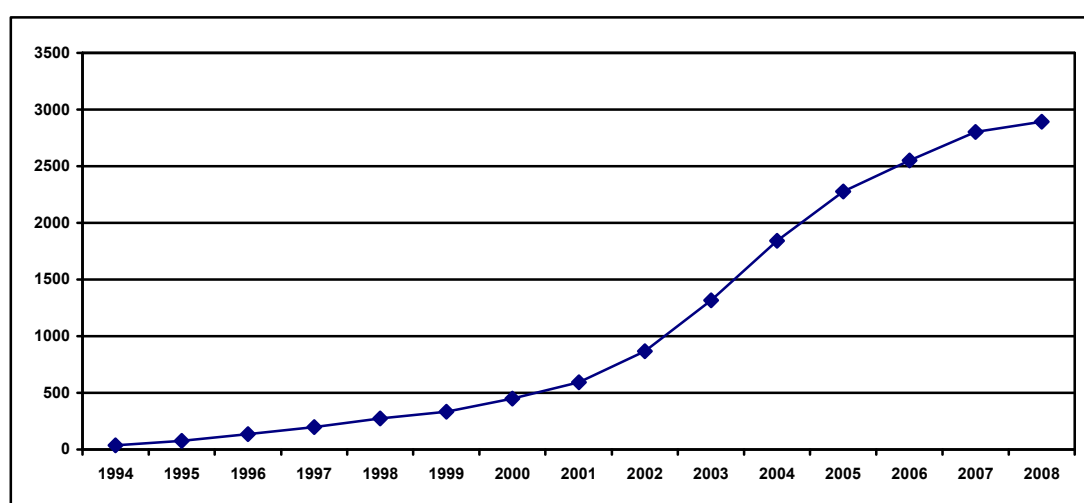
Specialist Schools

The specialist schools programme, initiated by the Major government, is significant in that it was the flagship of New Labour’s school diversity policy. In its first White Paper, the Blair government demonstrated a strong intention to continue this programme (DfEE, 1997a: 40). The School Standards and Framework Act 1998 allowed not only the existing selective schools to continue being so, but also specialist schools to select up to 10 per cent of their pupil intake according to ‘aptitude’ for the subject specialism. The school diversity policy was strikingly strengthened with a

White Paper (DfES, 2001a) that set out proposals for extending school diversity programmes including specialist schools, Beacon schools and City Academies. Additionally, the government consistently encouraged faith schools as a way of increasing school diversity, welcoming the proposal that ‘the Church of England increases significantly the number of secondary school places it supports’ (DfES, 2001a: 45).

Specialist school status was acquired through a bidding process, and secondary schools including special schools that applied for this status had to raise at least £50,000 of unconditional private sector sponsorship. The approved school received £100,000 in capital funding and £129²⁹ per pupil for four years. Since 2002, specialisms have been extended to business and enterprise, mathematics and computing, science, and engineering. In 2003, the specialist schools programme was further extended, along with a strategy document (DfES, 2003b) setting out the plan, together with the new extended target of 2000 specialist schools by 2006. This was done in order to introduce new specialisms such as music and humanities (history, geography, English), a rural dimension and combined specialisms. As Figure 4.2 shows, the number of specialist schools was strikingly increased, achieving the target of 2000 by 2005. The Specialist Schools Trust contributed to this rapid increase by strongly promoting the specialist movement (Levacic and Jenkins, 2006: 231).

Figure 4.2. Specialist schools operating in 2008 by designation year



Source: Constructed from DCSF (2008h)

²⁹ This recurrent funding was increased from £126 to £129 from September 2005.

Currently, there are ten specialisms and 2892 specialist schools, which cover almost all secondary schools eligible for specialist status. This universality of specialist status in secondary schools helped to ease concerns about the emergence of a two-tier system and selective education between specialist and non-specialist schools (Thornton, 2001; Hattersley, 2002). Moreover, the need to restructure this programme was amplified as specialist schools increased. In 2004, the government encouraged schools to take on both foundation status and specialist school status for wider responsibilities (DfES, 2004c), and ‘high performing specialist schools’ began to take on a second specialism, training school status and participate in Leading Edge Partnership activity. Following Ofsted’s second evaluation of specialist schools – with convincingly positive evidence (Ofsted, 2005) – specialist schools began to be re-designated from 2007, along with a unified guidance (DCSF, 2008h), and to be given more duties such as promoting community cohesion from September 2007 and all secondary schools providing extended services by 2010.

4.4.3. Early years education and the Foundation Stage

Growing concern for childcare

Early years education and childcare, addressed partly in the 1997 White Paper, is one of the policy agendas with which New Labour was very much concerned. In May 1998, the government shaped a ‘national childcare strategy’, via a Green Paper, aiming to ‘ensure good quality, affordable childcare for children aged 0 to 14 in every neighbourhood’ and offer ‘equal opportunities to parents, especially women and to supporting parents in balancing work and family life’ (DfEE/DSS, 1998: 15). This strategy was in line with welfare reform to prevent social exclusion through encouraging employment (DSS, 1998a; 1998b; 1999a; 1999b). Additionally, following its comprehensive spending review (HMT, 1998), the government established some 250 (later 500) local Sure Start programmes to provide community-based support for parents and children under four in disadvantaged neighbourhoods (Sylva and Pugh, 2005: 12).

In line with the new partnership strategy, the growing concern over provision for young children allowed the DfEE to emerge as a leading department in coordinating

the provision, taking over responsibility for all ‘day care’ services for children under eight from the DoH. Also, the importance of early learning was supported largely by two strands of research – the study of developmental psychology, which sees the earliest interactions between child and carers as providing the cultural structure critical in developing intellectual schemas (Gopnik et al., 1999) and the study of the development of the brain, which sees early learning as a stimulus for optimal brain development (Blakemore and Frith, 2005).

Introduction of the foundation stage

In terms of curricular development, one thing notable is that this concern for early years provision finally led to the introduction of the ‘foundation stage’ for young children. In September 2000, the foundation stage was introduced as a distinct phase of education for young children aged three to five (the end of the reception year), following a publication (DfEE/QCA, 2000) setting out six areas of learning which formed the basis of the foundation stage curriculum. These areas became statutory by the enactment of the Education Act 2002, which incorporated the foundation stage within the National Curriculum in England. In 2001, the government introduced the national standards for childcare providers with a publication (DfEE, 2001b). In 2003, early years provision was strikingly extended by a new framework for birth to three-year-olds (DfES/SureStart, 2003), setting out the four aspects of a strong child, a skilful communicator, a competent learner and a healthy child.

The ‘every child matters’ framework, established by three main documents (HMT, 2003; DfES, 2004b; 2004g) and the Children Act 2004 were extended to young people under 19, under the umbrella of five key outcomes that really matter for children and young people’s well-being (HMT, 2003: 14). In December 2004, the government established the ‘ten-year childcare strategy’ through a publication (HMT, 2004) focusing on giving parents greater choice about balancing work and family life. In 2006, this strategy was embodied through the establishment of the Early Years Foundation Stage (EYFS), whereby the three frameworks in the documents (DfEE/QCA, 2000; DfEE, 2001b; DfES/SureStart, 2003) were integrated. The Childcare Act 2006 provided the context and legal basis for the delivery of the EYFS, setting out six areas which should be covered by early learning goals and educational programmes (Section 41(3)). In 2007, these areas were specified by a statutory

framework (DfES, 2007b) and practice guidance (DfES, 2007c). The EYFS became mandatory from September 2008 for all schools and early years providers in Ofsted-registered settings attended by young children from birth to five (DfES, 2007b: 7).

4.4.4. Raising standards in primary schools

National Literacy and Numeracy Strategies

The National Literacy Project and the National Numeracy Project, initiated by the Major government as pilot schemes, developed under New Labour into the National Literacy Strategy and the National Numeracy Strategy, respectively. It is the themes of literacy and numeracy that the Blair government chose as key levers to raise standards in primary schools, along with the content of an announcement regarding national targets to be achieved by 2002 (DfEE, 1997a: 19). In its first White Paper, the government set out clear policy directions which would be provided in future:

- At least an hour each day devoted to both literacy and numeracy in every primary school.
- National guidelines and training for all primary teachers on best practice in the teaching of literacy and numeracy.
- A great improvement in achievements in maths and English at the end of primary education, to meet national targets.

(DfEE, 1997a: 5)

The two National Literacy and Numeracy Strategies (NLNS) were implemented across English primary schools at the start of the autumn terms in 1998 and 1999, respectively, along with other national guidelines (DfEE, 1998d; 1999b). The given reasons for the introduction of the NLNS lie in the recognition that literacy and numeracy were ‘fundamental to all future learning,’ while there were too many children with poor literacy and numeracy skills in England compared to developed or English-speaking countries (DfEE, 1997a: 19). The influential role of Ofsted and its leader, Chris Woodhead, one of the ‘three wise men’ advocating a ‘back to basics’ policy of clearly structured whole-class teaching, can be inferred. In addition, Ofsted’s role was in parallel with welfare-to-work policies for encouraging

employment and associated with ‘the third way’ (Brehony, 2005: 32). From a global perspective, it is clear that behind the given reasons there was a growing concern about maintaining an international competitiveness in the knowledge-based and globalised economy. In this sense, NLNS can be regarded as a modernised form of the old three Rs, which had been a predominant part of the curriculum under the Revised Code of 1862.

NLNS was aimed at ‘changing teaching practice and thus improving pupil performance in all the nearly 20,000 primary schools in England’ (Earl et al., 2003: 11). Notable is that the implementation of NLNS facilitated the process of narrowing or dismantling the National Curriculum at key stages 1 and 2. To help support the strategies, the government argued that ‘the existing National Curriculum needs to be more sharply focused on giving all children a proper grounding in the basics within a broad and balanced curriculum’ (DfEE, 1997a: 22). Accordingly, the detailed statutory requirements in the programmes of study at key stages 1 and 2 in six foundation subjects were lifted in 1998 by the QCA, and primary schools were told in 2000 to cut back on subjects such as music, art and physical education in order to concentrate on literacy and numeracy (Brehony, 2005: 35).

As for teachers, NLNS was a further threat to their weakened professional autonomy in that, though they are not statutory, teachers were controlled even in how they were to teach as well as what to teach. It was interactive, whole-class teaching that NLNS particularly emphasised in the hope that ‘more interactive forms of whole class teaching will play a vital role in raising literacy and numeracy standards by promoting high quality dialogue and discussion and raising inclusion, understanding and learning performance’ (Smith et al., 2004: 395-6). It was stipulated that the ‘literacy hour’ should be spent whole-class teaching, except for twenty minutes for guided group and independent work (DfEE, 1998d: 11-14), and direct teaching and interactive oral work with the whole class and groups should be used as a principle teaching method (DfEE, 1999b: 11).

Primary National Strategy: a radical turn?

In 2002, it was reported that ‘75% of pupils achieved the expected standards for their age in English and 73% did so in mathematics’ (DfES, 2002a: 1). Although the

government's targets for 11-year-olds for 2002 were not fully met, the team commissioned an external evaluation of NLNS, and concluded in their final report that 'there have been indications of improved teaching practice and pupil learning, as well as a substantial narrowing of the gap between the most and least successful schools and LEAs' (Earl et al., 2003: 8). In September 2002, the DfES published a booklet with the intention of '[stimulating] discussion about the next steps needed to sustain those improvements and to raise standards further' (DfES, 2002a: 1). In this endeavour, the Primary National Strategy (PNS) was launched in May 2003 with the publication of *Excellence and Enjoyment* (DfES, 2003a), with NLNS subsumed into this new strategy.

This 2003 document was significant in that it brought about a radical change in the policy stream. NLNS was a typical top-down policy with a unified national framework for teaching. Under NLNS, the discretion and autonomy of primary schools and their teachers were greatly reduced, along with an increased emphasis on literacy and numeracy and resultant pressure to meet performance targets. However, this policy stream was strikingly turned around by the new PNS. The document described the main directions of the PNS as follows: 'Our new Primary Strategy will support teachers and schools across the whole curriculum... moving on to offer teachers more control and flexibility' (DfES, 2003a: 27). In line with the emphasis on the whole curriculum, the government extended the sort of support provided by NLNS to all foundation subjects, drawing on existing programmes for developing modern foreign languages, PE and school sport, music, the arts, and creativity, along with the use of ICT (DfES, 2003a: 5). This was a response to criticisms about the negative subject-squeezing effects of NLNS on the breadth and balance of the primary curriculum (Galton and MacBeath, 2002; CFAS, 2003). In 2002, the QCA published a guidance booklet (QCA, 2002a) advocating a broad and balanced curriculum.

The emphasis on giving teachers more power and flexibility in teaching reflects the government's response to demands from teachers. Under the National Curriculum and NLNS, many teachers felt they were given 'so little time to do their jobs properly' (Long, 2002). Many teachers and their unions were opposed to the national tests at key stages 1 and 2 (Henry, 2002). In December 2003, the NUT voted to boycott the tests at these stages, and there emerged calls for a shakeup of primary league tables in

England to make national tests less ‘high stakes’ (Smithers, 2003a; 2003b). In this situation, the government had to give teachers increased power and flexibility for teaching, stating that ‘a central message of this document is that teachers have the power to decide how they teach, and that the Government supports that’ (DfES, 2003a: 16).

Furthermore, the PNS focused on individualised/personalised learning along with the concepts of excellence, enjoyment and creativity. Its overall goal was ‘for every primary school to combine excellence in teaching with enjoyment of learning’ (DfES, 2003a: 4). To this end, emphasis was placed on individualised learning, with a statement that ‘learning must be focused on individual pupils’ needs and abilities’ (DfES, 2003a: 39). In terms of teaching methods, this was a move away from direct, whole-class teaching supported by the previous Conservative government and encouraged under the NLNS regime. This move reflected changing socio-economic situations relating to the new knowledge-based economy calling for more creativity. Demos were organised, with the protagonists arguing that the school curriculum should be restructured to provide individualised learning programmes which would develop the creative ability needed in this economy (Seltzer and Bentley, 1999; Bentley, 2002). As a response, there emerged some actions addressing creativity more directly and significantly (NACCCE, 1999; QCA, 2003a). *Excellence and Enjoyment* was a complex document which embraced all the concepts mentioned above.

In September 2006, a document was published giving the PNS a renewed Primary Framework (PF) (DfES, 2006b). In line with the incorporation of the foundation stage into the EYFS, the PF was intended to offer ‘everyone involved in teaching children aged from 3 to 11 an opportunity to continue the progress made in raising standards’ (DfES, 2006b: 1) by embedding the principles of both documents (DfES, 2004d; 2004g). The PF initiated a number of changes in literacy and mathematics (see Appendix 4.19). In particular, facing the finding that around 20 per cent of children leave primary school without the reading skills expected at their age, the DfES was urged to ‘commission a large-scale comparative study, comparing the National Literacy Strategy with “phonics fast and first” approaches’ (HCEsc, 2005: 36), and the Rose Report (DfES, 2006c) on early reading was duly produced with its recommendations focused on what constituted ‘high quality phonics work’. These

recommendations facilitated the emergence of this PF.

4.4.5. New Labour policies on the 14-19 curriculum

Curriculum 2000

In May 1996, the Labour Party proposed a unified and modular 14-19 curriculum and qualification framework (Labour Party, 1996). However, in its 1997 manifesto, the Labour Party significantly changed its stance with the declaration that it would ‘support broader A-levels and upgraded vocational qualifications, underpinned by rigorous standards and key skills’ (Labour Party, 1997). After coming into power, the Labour government positioned itself towards embracing the 1996 Dearing recommendations through a further round of reviews and consultations and a consultation paper (DfEE/DENI/WO, 1997), following the decision to defer the A-levels and GNVQ reforms which were recommended by the 1996 Dearing Review and were due to be implemented in 1998 (DfEE, 1997e). The government made a drive toward establishing the QCA as a single regulatory body by merging the SCAA and NCVQ and rationalising the major academic and vocational awarding bodies into three unitary awarding bodies in England, each offering GCSEs, A-levels and GNVQs (DfEE, 1997f; 1997g).

This consultation paper proposed a number of reforms that built upon the 1996 Dearing recommendations, and during the consultation process these reforms became known as ‘Curriculum 2000’. These reforms can be understood either as ‘a modernised and aligned track-based system’ or as ‘a stage to a more unified and all-through system for lifelong learning’ (Hodgson and Spours, 2003: 31-35). The main reforms of Curriculum 2000 included the new AS/A2, AVCE³⁰ and Key Skills Qualifications, replacing the old linear and modular A-levels and Advanced Level GNVQs; these reforms were largely focused on qualifications rather than curriculum. Curriculum 2000 was introduced in September 2000 following the development of guidance for schools and colleges (QCA, 1999a; 1999b) and was aimed at broadening A-levels by encouraging students to mix-and-match qualifications (DfEE/DENI/WO,

³⁰ Advanced Vocational Certificate of Education.

1997: 6).

However, this aim was not successfully achieved in its first two years. Some studies suggest that Curriculum 2000 did not reveal any conclusive evidence about increased participation in advanced-level study (QCA, 2002b; Hodgson and Spours, 2003). It became possible for learners to achieve higher grades in the AS/A2 due to the opportunity to retake modules, but many learners found the AVCE difficult because its Level 3 design, pass rates and grade achievement were substantially lower than those in A-levels (JCGO, 2002). Moreover, Hodgson et al. analysed its effect on the breadth of the advanced-level curriculum and contend that the advanced-level curriculum was not broadened as much as expected by Curriculum 2000 (see Appendix 4.20). Curriculum 2000 was not successful, largely due to the fact that it was based on voluntarism as well as the way it was conceived and introduced without sufficient discussion and preparation (Priestley, 2003; Hodgson et al., 2004). In June 2001, Estelle Morris responded to these problems by asking the QCA to review the Curriculum 2000 programme (QCA, 2001a: 1). As a result, three phases of the review were conducted by the QCA between June 2001 and December 2003 (QCA, 2001a; 2001b; 2003b). However, the grading crisis following the summer A-level examinations of 2002 ultimately led to Morris's resignation and Charles Clarke took office in October 2002.

14-19 policies towards a unified system?

Alongside Curriculum 2000, policy development took place in a wider area of 14-19 education and training. A new phase of policy development in 14-19 provision was signalled by a White Paper (DfES, 2001a), through which the government opened up, for the first time, an official debate about the whole 14-19 phase with a statement that 'we want to promote a wide debate about how to implement further improvements in education for our 14-19-year-olds and achieve necessary changes to long-established structures' (DfES, 2001a: 32-33). The debate about the 14-19 curriculum and qualifications was further developed between 2002 and 2004. In February 2002, a Green Paper (DfES, 2002b) was put forward. In January 2003, the main proposals in the Green Paper were incorporated into a departmental document whereby an intention to develop a unified framework for the 14-19 curriculum and qualifications was clearly expressed:

A unified framework would be designed to provide opportunities for young people of all abilities, by promoting progression from Foundation through Intermediate to Advanced levels. Baccalaureate-style qualifications of this kind work well abroad. We believe that this model, designed to suit English circumstances, could tackle long-standing English problems.

(DfES, 2003d: 7)

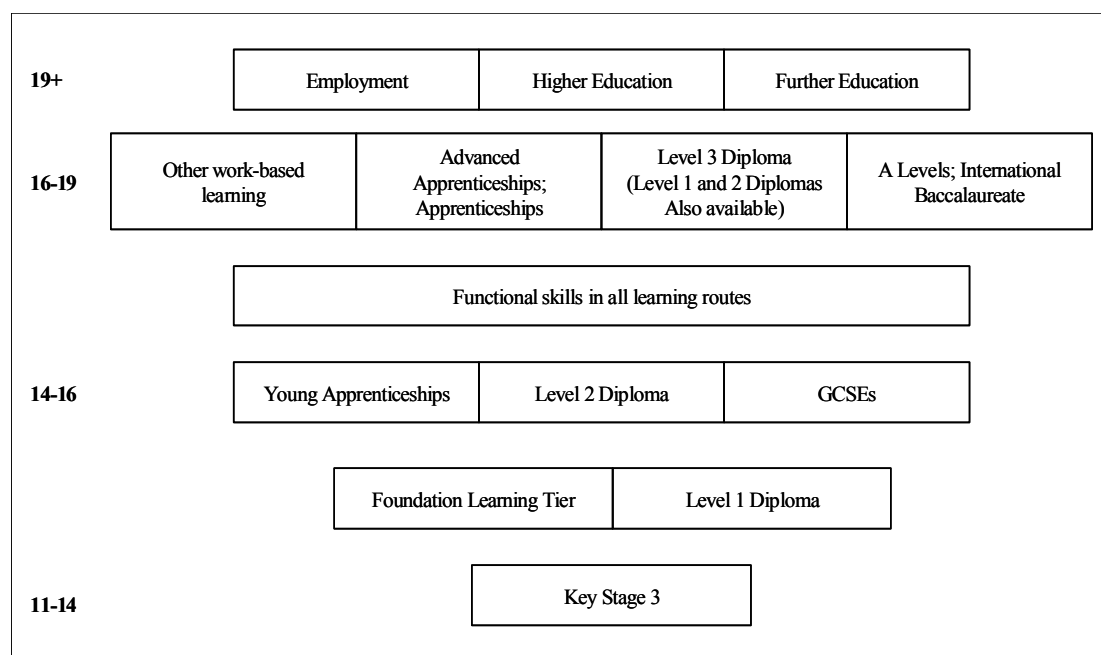
To this end, the government appointed in March 2003 the new Working Group for 14-19 Reform, chaired by the former Ofsted chief, Mike Tomlinson. This drive toward reforming the 14-19 curriculum and qualifications was further extended by the skills strategy set out in another White Paper (DfES et al., 2003a). In October 2004, the working group duly produced its final report (Tomlinson Report, 2004). The centrepiece of the proposals in the report lay in replacing the existing plethora of qualifications with a four-level unified diploma framework. Teachers and the majority of the education establishment gave strong support to the report, labelling the proposals a ‘last chance saloon’ for secondary education (Curtis, 2004). In February 2005, the government’s official response to the report came with a White Paper (DfES, 2005e) and its implementation plan from 2005 to 2015 (DfES, 2005f). The government agreed with many of the proposals in the report, but rejected the core proposals for the introduction of the unified diploma framework, with a clear statement that it would ‘retain GCSEs and A-levels as cornerstones of the new system’ (DfES, 2005e: 6).

This rejection reflects some of the political landscape of this time. In December 2004, there were many ministerial changes. Furthermore, many from industry questioned if the proposals in the report could lead to improvements in literacy and numeracy skills, which were their overwhelming concern (Curtis, 2004). More importantly, the forthcoming general election in May 2005 may have forced the Labour Party not to change the widely-honoured status of GCSEs and A-levels, which would fall to a ‘subject components’ status in the unified diploma framework (DfES, 2005e: 24). Instead, the government announced the introduction of new specialised ‘diplomas’ which would be available at Levels 1 (equivalent to 4-5 GCSEs at grades D to G), 2 (equivalent to 5-6 GCSEs at grades A* to C) and 3 (equivalent to three A-levels), covering each occupational sector of the economy with academic and vocational

material (DfES, 2006f: 2). The government set a schedule of introducing the diplomas into fourteen occupational areas³¹ as a national entitlement by 2015 (DfES, 2005e: 6), with the first five diplomas in IT, health and social care, engineering, creative and media, and construction; the built environment being available for teaching in September 2008 (DfES, 2006g: 3).

Under the new partnership strategy, all diplomas ‘[were] being developed by employers, schools, colleges and universities, with awarding bodies, to help young people realise their potential and gain knowledge and skills in a “real world” environment’ (DfES, 2006f: 2). The development of diplomas was a central pillar of the 14-19 reform agenda set out in a Green Paper (DfES, 2007d). As Figure 4.3 demonstrates, diplomas were positioned as one of the main future qualifications pathways set out in the Green Paper, and the Foundation Learning Tier, announced in a White Paper on further education (DfES, 2006e), was developed to ‘replace and rationalise the current complex range of provision and qualifications below level 2’, with a focus on ‘skills for life and work, subject and vocational learning, and personal and social development’ (DfES, 2007d: 27).

Figure 4.3 Future qualifications pathways



Source: DfES (2007d: 24)

³¹ On 23 October 2007, it was announced that new three diplomas in science, languages and humanities would be offered from 2011 (DCSF, 2008i).

The present Brown government has since confirmed the policy direction of the 14-19 reform agenda, determined in the 2005 White Paper (DfES, 2005e) and extended in the 2007 Green Paper, through its own White Paper (DCSF, 2008j). The Labour government's intense drive toward reforming the 14-19 curriculum and qualifications was a political response to economic needs and social justice in that it saw the 14-19 reforms as 'equipping young people with the skills employers need and the ability to go on learning throughout their lives', and giving them 'the chance to break forever the historic link between social background, educational achievement and life chances' (DfES, 2005e: 3). The key concepts used in the 14-19 policy area such as excellence, standards, choice, personalisation, a national 14-19 entitlement, a focus on basic skills and provider collaboration can be ultimately understood within the contexts of economic needs and social justice, challenged by the globalised and knowledge-based world.

Key stage 3 and personalised learning

In the process of the 14-19 reforms, the government saw the key stage 3 phase, which had received comparatively little policy concern, as a starting point for these reforms. In 2000, the government launched the subject-focused Key Stage 3 National Strategy, initially concentrating on English and mathematics (later, science and ICT were included), building on the successes of NLNS. The government also set national targets – by 2007, 85 per cent to achieve level 5 or above at the end of key stage 3 in English, mathematics and ICT, and 80 per cent in science (DfES, 2001a: 18). This strategy was broadened in the third year through 'the development of a cross-curricular approach using the whole-school initiatives and the behaviour and attendance strand' (DfES, 2005g: 4), and developed into the Secondary National Strategy covering the key stages 3 and 4 in line with the proposals in *Five Year Strategy* (DfES, 2004c: 60).

Alongside the development of the strategy, personalised learning emerged as a new concept influencing teaching methods for secondary as well as primary schooling. David Miliband saw creating 'an education system with personalised learning at its heart' as the solution to the critical challenge in education: 'how do we achieve both excellence and equity?' (DfES, 2004e: 2).

Distinct from the term ‘learning’, personalised learning is officially defined as ‘high quality teaching that is responsive to the different ways students achieve their best’ and as having five components, that is, assessment for learning, effective teaching and learning strategies, curriculum entitlement and choice, school organisation, and strong partnership beyond the school (DfES, 2004f: 6-14). In *Five Year Strategy*, the personalisation of teaching and learning was offered as a means for a new secondary strategy for teaching and learning (DfES, 2004c: 59-60). However, Courcier (2007) found that a number of schools and teachers struggled to understand and make effective use of this new teaching style because the definition of personalised learning is ambiguous.

4.5. Summary

In this chapter, I have discussed teacher policy developments in the second teacher policy area of curriculum and teaching, focusing on the five key policy themes of curriculum control and change, the school system, examinations and assessment, teaching methods, and professional autonomy. In the early era governments, the three Rs and religious education for the children of the poor developed into an institutional curriculum in the voluntary schools under the influence of the church. Central control over the school curriculum was institutionalised through annual elementary codes and secondary regulations. In addition, a national examination system for secondary pupils was introduced as an academic qualification. In the post-war era governments, the school curriculum became unregulated through the 1944 Act and teachers were autonomous in their teaching. Secondary schools developed along the tripartite system, and limited efforts by Conservatives to improve secondary education were reflected in the three CACE reports; comprehensive reorganisation from 1965 was initiated as a reaction to this development. A growing concern for a child-centred curriculum and teaching was crystallised in the Plowden Report. The GCE and CSE examinations were introduced and the SSEC were replaced with the SCCE.

The Thatcherite governments centralised the school curriculum, strengthening parental choice in the education market through legislation. In contrast, the teachers’

professional autonomy was weakened with the disbandment of the SCCE. Central control over the curriculum was revived in a more intensified form through the introduction of the National Curriculum. In the post-14 curriculum, a great deal of policy concern was paid to vocational education along with a range of initiatives, and new qualification frameworks with triple tracks were established by the mid-1990s. Under the New Labour governments, policies on the curriculum and teaching became more specialised and prescriptive. Schools were encouraged to specialise under a range of school diversity programmes. A series of curricular policies from the EYFS to the 14-19 curriculum was introduced, and literacy and numeracy hours and certain teaching methods were prescribed under NLNS.

Chapter 5: Policies on Employment and Professional Development

The previous chapter addressed policies in the second teacher policy area of curriculum and teaching. This chapter addresses policies in the last teacher policy area of teacher employment and professional development. As with the two previous chapters, policies in the early era governments will be analysed in terms of HILs in the first section of this chapter, and policies in the last three groups of government will be analysed under the consideration of government strategies.

5.1. HILs in the Early Era Governments

5.1.1. Policy developments by 1900

Teacher certification and employment under the 1846 regime

Traditionally, the statutory power for licensing schoolmasters before state intervention in education was in the hands of local dioceses' Anglican bishops (Cole, 1957: 68). During the eighteenth century, the bishops still had this statutory power to license teachers, but this power became sizeably weakened by a number of judicial decisions early in the century confirming that the matter of unlicensed teaching fell within the jurisdiction of the temporal, not the ecclesiastical, courts (Montmorency, 1902: 178-180). Accordingly, in the eighteenth century, there were no legislated qualifications for teachers. Schoolmasters were involved in teaching by reference to their own schooling and private reading, and some previous experience of other occupations. The SPCK and trustees of the London charity schools attempted to specify the requirements essential in the choice of a master, but the main emphasis of the requirements was placed on good character and religious knowledge (Tropp, 1957: 6). Furthermore, most schoolmasters at this time did not have regular incomes or fixed salaries. As Lawson and Silver (1973: 190) put it, teaching the children of the poor was 'a humble occupation that might earn local respect but conferred no status: the

financial rewards were meagre and the work was considered suitable only for the poor themselves to undertake’.

The rise of the monitorial system in the early nineteenth century was an attempt to cope with the difficulty of the shortage of teachers that resulted from the rapid growth of the school population. In terms of a teaching profession, however, the monitorial system was nothing more than a further depreciation of its status. The low status of teachers in society deteriorated further with the introduction of this monitorial system in which young pupils instead of normal adult teachers taught their peer pupils. As discussed, the monitorial system was developed into the pupil-teacher system from 1846. Under the 1846 regime, however, there were some significant developments towards a modern teaching profession.

First of all, the government became involved in the process of teacher training and employment through the provision of its grants (CPCE, 1846b: 4-6) – pupil-teachers received their salaries from the government on a scale in which their stipend was £10 a year and rose by annual increments of £2 10s to £20 for five years’ service in elementary schools; after finishing his service as an apprentice, the pupil-teacher, who won a Queen’s scholarship worth £20 or £25 a year, went to a training college; annual grants were paid to training colleges for each of the three years of training; certificated teachers received grants from the government; and old-age pensions were planned for men and women teachers who had a minimum of fifteen years’ service in approved schools. With state financial aid, the number of pupil-teachers rose from 3580 in 1849 to 15,224 in 1859 (CPCE, 1860: xii). In addition, the number of training colleges increased from sixteen in 1850 to thirty-four in 1870, and the number of student places provided by them increased from 991 in 1850 to 2,495 in 1870 (BoE, 1914: 5).

Another development was the establishment of a national teacher certification system at elementary level. Since 1846, teachers had been certified in one of two ways: those training college students, who completed a two-year training course and were successful in the final examinations, were given certificates by the ED; those pupil-teachers who completed apprenticeship but failed to obtain Queen’s scholarships could become untrained certificated teachers by taking the ED examinations (later

known as the Acting Teachers' Examination). The certificated teacher qualified for an annual augmentation to his salary by a direct grant from the government of between £15 and £30 per year, made on the condition that the school managers, for their part, paid the teacher at least double the amount of the grant (CPCE, 1846b: 6). With this financial inducement, certificated teachers increased in number from 142 in 1847 to 12,604 in 1859 (see Appendix 5.1). However, uncertificated teachers accounted for the majority of teachers in elementary schools until a much later date.

In terms of HILs, one thing to note is that from its inception the standard of the teacher certification was set by the government, which was able to control the supply of teachers by adjusting this standard. Following the 1944 Act, this standard developed into more detailed requirements for QTS. More important is that this statutory certification system was confined to the public elementary schools aided by the state, and was not applied to the independent schools, which were not financially aided by the state. This tradition, instituted under the 1846 regime, had a consistent effect on subsequent policies. QTS has, since 1944, been required for only those intending to teach in maintained schools, and the National Curriculum is not applied to independent schools.

The last, but not least, development under the 1846 regime was the establishment of the legal status of teachers in England. Under the 1846 regime, newly certificated teachers in elementary schools enjoyed a 'pseudo-civil service' position within a closed employment process, from pupil-teachers through training colleges and examinations to employment in elementary schools with consistent financial support by government. However, the government did not directly employ teachers, and the teachers were not civil servants. The tradition of a non-civil service status for teachers came to be institutionalised by the 1846 regime and still remains as a central HIL, deeply rooted in current institutions.

Reactions of teachers to payment by results and the 1870 Act

With national implementation of the Revised Code of 1862, elementary teachers, including pupil-teachers, were exposed to a deteriorating situation in many aspects. The code abolished all direct payments including pupil-teacher salaries, merit grants for certificated teachers and retirement pensions to teachers and pupil-teachers. It also

abolished all the existing annual grants such as building and furniture grants, book grants, scientific apparatus grants and special grants for drawing, industrial work, infant schools, ragged schools and evening schools by merging them into a single payment of so much per child to the school managers with the use of ‘payment by results’.

The introduction of the code was an official stoppage of the 1846 regime. Under the code, pupil-teachers now had to contract their apprenticeship out to the managers of their schools instead of the masters, and the amount and level of instruction they were to receive in their elementary schools and the number and value of Queen’s Scholarships were substantially reduced. Accordingly, the number of pupil-teachers admitted to apprenticeship fell for a few years from 3,092 in 1861 to 1,895 in 1864 (CPCE, 1862b: liii; 1865: lxxxvi). Under the code, the status and working conditions of teachers in elementary schools deteriorated. The teachers now lost their stable status previously ensured by the 1846 regime; those teachers who entered after the code were not entitled to pension rights, their ability was evaluated and their salaries influenced by the percentage of their pupils’ pass rates, which was tested annually by HMI, and their role and work became more mechanical, being forced to teach only the grant-earning subjects of the three Rs. The average salary of a certified teacher fell from £95 in 1861 to £87 in 1866 (Tropp, 1957: 96). In terms of HILs, this payment by results system is significant in that the main concept of this system linking performance to pay was revived in the early 1990s under the terms of performance-related pay (PRP), and later developed into performance management (PM) under New Labour.

This deteriorating situation in the 1860s stimulated the teachers and various associations opposing the code to raise awareness of the need for an inclusive national union to fight for an improvement in their status. This finally led to the establishment of the National Union of Elementary Teachers (NUET) in 1870 at a time when the rapid expansion of elementary education was envisaged by the passing of the 1870 Act. Tropp (1957: 113) lists nine basic aims which the NUET sought to achieve from the beginning: control of entrance to the profession and teachers’ registration; the recruitment of teachers to the Inspectorate; the gaining of a right of appeal; superannuation; the revision of the educational code; the gaining of security of tenure;

freedom from compulsory, extraneous duties; adequate salaries; and freedom from ‘obnoxious interference’.

By the turn of the century, the NUET, renamed in 1889 the NUT, saw as its achievements the ending of payment by results and the institution of a pension scheme by the Elementary School Teachers (Superannuation) Act 1898. The Act provided for deferred annuities, superannuation allowances and disablement allowances, but limited its application to certificated teachers in elementary schools. However, the full Inspectorate status still remained as a post for university graduates from Oxford and Cambridge. Many teachers in voluntary schools were still exposed to a situation in which they could be dismissed by the school managers without specified regulations for their tenure or arrangements for their appeal. Village teachers often had to perform compulsory, extraneous tasks including taking charge of the Sunday school and a variety of parochial offices in the parish, which were usually regarded as more important than their mere technical ability to teach.

The value of the teacher certificate was damaged by the abolition of grants for certificated teachers. In addition, the standard of the certificate had to be lowered by the 1870 Act providing elementary education for children aged 5-12 with the creation of school boards. The 1862 Code and the 1870 Act reflect different socio-economic contexts – while the former was a hostile reaction to an over-education of the working class, the latter was a compromise response both to a perceived need for maintaining economic competitiveness against the economic challenge of America and Germany by more investment in education and to demands for popular education strongly expressed by the National Education League. With the 1870 Act, some 2,500 school boards were created in England and Wales between 1870 and 1896 (Lawson and Silver, 1973: 320) and average national attendance in 1895 marked nearly 1.9 million at board schools and more than 2.4 million from just over 1.2 million in 1871 at voluntary schools (see Appendix 5.2).

In line with this expansion in elementary schooling, there was also a rapid increase in the number of teachers working in these schools, rising from 28,341 in 1870 to 126,583 in 1895 (see Appendix 5.2). One thing to note is that teacher supply for the expansion in the period was met by the dilution of the standard of the certificate –

during the three years up to the end of 1873, experienced teachers could be awarded certificates on the report of the Inspector instead of through an examination, and provisional certificates were issued to enable ex-pupil-teachers to take charge of small schools; the 1876 Code further relaxed the conditions for awarding certificates without examination, and the 1893 Code officially allowed those women over eighteen years of age and approved by the Inspector to be employed as ‘additional female teachers’. Another thing to note is that elementary school teaching now became a female-dominated profession. The proportion of female teachers increased from 53.1 per cent in 1870 to 73.5 per cent in 1895 (see Appendix 5.2).

Secondary school teachers in the nineteenth century

In the nineteenth century, British society was more class conscious and ‘public schools’ became a central locus for the sons of the upper class on a fee-paying basis, which strikingly contrasted with contemporary elementary schools such as voluntary schools, board schools and Sunday schools for the children of the working class. A more notable point is that this class division was also reflected in the status differences between elementary and secondary teachers. The status of elementary teachers as positioned by society in the early and mid-nineteenth century was inevitably low, but improved to some degree with the introduction of the national training system and the professional influence of the NUET. However, elementary teachers were ‘drawn almost exclusively from the ranks of the upper working class’ and ‘no respectable middle class family would allow its sons or daughters to lower themselves by entering elementary teaching’ (Evans, 1975: 122). Conversely, teachers working in public schools in the nineteenth century were accorded a substantially higher status by contemporary society. Most teachers appointed at the leading public schools during this period came from a high level of family judging from their fathers’ social status (see Appendix 5.3).

Three reports produced in the 1860s also reflected the class division at this time – the Newcastle Report (NC, 1861) mainly addressed elementary schools providing a popular education for the working class children; the Clarendon Report (CCa: 1864) focused on the nine leading public schools providing an education for upper class children; and the Taunton Report (TC, 1868) was mainly concerned with schools such as proprietary schools and grammar schools providing an education for middle class

children, and recommended a national system of secondary education based on the existing endowed schools. The secondary schooling system in the latter part of the nineteenth century was established by the two statutes of the Public Schools Act 1868 and the Endowed Schools Act 1869.

Although the need for an expansion of secondary education was almost universally acknowledged by the time the Bryce Commission was appointed to look into the condition of secondary education, secondary education by the end of the nineteenth century was still limited to the children of the middle class, comprising by 1900 about 30,000 pupils in some 100 schools, most of which had developed into private elitist schools from the endowed grammar schools (Simon, 1965: 95-112). As we shall see below, secondary school teachers still succeeded in maintaining their separate teaching status from that of elementary teachers, even after the introduction of the teachers' registration in 1902, by using a separate column in the register. As Bergen (1988: 55) puts it: 'the triumph of separate middle class secondary education meant the triumph of separate middle class secondary teachers and the defeat of the elementary teachers' attempts to constitute a single, unified and closed teaching profession'.

The College of Preceptors and the Teachers' Registration Movement

As noted, the state system of teacher training at elementary level started with the introduction of the pupil-teacher system linked to training colleges. However, teaching was not conceived of as a full profession in the first part of the nineteenth century, and was recorded by the census enumerators under 'learned occupations' until 1861 when it was categorised under 'professions' (De Bellaigue, 2001: 973). One thing notable in the first half of the century is the emergence of professional associations, such as the Society of Apothecaries, the Law Society, and the British Medical Association, which controlled the entrance of unqualified practitioners to their professions. In line with this trend, the College of Preceptors was established in 1846 by a group of private schoolmasters seeking a professional status equal with that of a lawyer or doctors, and was granted the royal charter on 28 March 1849 (Chapman, 1985: 45). A movement to create a teachers' register maintained by a body like the General Medical Council appeared in 1860 from among the members of the College

(Baron, 1954: 133) and was strengthened by the establishment of the Scholastic Registration Association in 1864.

Since the emergence of the NUET in 1870, the question of whether a register should be confined to secondary school teachers or include all school teachers was an acute issue of difference between secondary and elementary teachers' associations, which led in 1890 to two different registration bills (HCPP, 1890a; 1890b). In 1901, a Consultative Committee, established on the basis of the Board of Education Act 1899, proposed both a double-columned register and a registration authority named the Teachers' Registration Council. These were accepted by the BoE and came into effect at the beginning of 1902. In the 1902 scheme, Column A was for certificated teachers in elementary schools and Column B for teachers in secondary schools. The Council consisted of twelve members, six appointed by the nomination of the President of the BoE and six from teachers' associations and the College of Preceptors (BoE, 1902b: 3). The two-column registration was a tactful device in order to appease both elementary teachers hoping for a comprehensive register and secondary teachers worrying about undermining their hope for their own self-regulatory council and register similar to that of doctors by including elementary teachers. However, the separated columns met with formidable hostility from the NUT for the period of 1902-1907 when the 1902 scheme was in effect.

Following the 1899 and 1902 Acts, the educational system in England became more centrally organised by the newly established BoE and LEAs. This situation, on the one hand, militated against the movement of teachers for a self-regulatory council and register but, on the other hand, contributed to the rapprochement between the elementary and secondary teachers against the increased control of education by central and local bureaucracy. The Education (Administrative Provisions) Act 1907 relieved the BoE of responsibility for continuing the register in any form, and the register and its council were abolished. Following the 1907 Act, an increasingly acrimonious struggle continued for four years between the leaders of the teaching profession across elementary and secondary schools and Robert Morant, Permanent Secretary of the BoE from 1902 to 1911, who held a negative view on a teachers' council and register. In 1912, the second teachers' register was introduced by issuing an Order in Council. Under the 1912 scheme, the Teachers' Registration Council

consisted of forty-four members with four groups of elementary, secondary and specialist teachers and universities, each having eleven representatives (BoE, 1911a: 46).

Although the new Council was welcomed by most teachers' associations, it had no regulatory power over entrance to the profession; it could just control admission to its register, which had no official standing. Following its constitutional change in 1926, an attempt to press for only registered teachers to be appointed was made, and a campaign to secure the title of 'Royal Society of Teachers' for the registered teachers' body started in 1929 (Baron, 1954: 142). However, the zeal and concern of teachers' associations for a self-regulatory council and register had waned since the First World War, with attention turning to other issues such as national salary scales and superannuation. Following the 1944 Act, the nominally-existing Council and its register were officially abolished by Order in Council in 1949. Five decades later, they were revived in the new form of the General Teaching Council for England (GTCE) by the Teaching and Higher Education Act 1998.

5.1.2. Policy developments since 1900

Teacher employment in secondary schools

As in the second half of the nineteenth century, British society continued to experience rapid socio-economic changes after 1900, which were accelerated by wars such as the Boer War and the First and Second World Wars, and the economic crisis of the 1920s and 1930s. After the 1870 Act, elementary education was provided virtually for free in the voluntary and board schools by the end of the nineteenth century. By contrast, secondary education in the nineteenth century was confined to the old grammar schools and public schools with the fragmentary and haphazard provision of public funds by the state, the reasons for which were described in a government report as follows:

England had been very slow to grasp the need for a national scheme of secondary education, partly because the deep-rooted individualism of the English character resisted any encroachment by the state on what had long been regarded as the

preserve of the Churches and of private enterprise; partly, it must be confessed, because the ruthless spirit of the industrial revolution regarded child labour as more important than education.

(MoE, 1951a: 33)

With the 1902 Act, the number of grant-aided secondary schools supported by the BoE increased from 491 in 1904-5 to 802 in 1908-9, and the number of pupils also rose from 85,358 to 135,776 (MoE, 1951a: 37). The process of increase in secondary education was furthered by the Fisher Act of 1918, making clear the responsibility of the state for secondary education. As discussed in Chapter 4, the secondary education system from 1902 followed the model of fee paying grammar schools. The free-place system, whereby the award of a grant depended on the school taking upwards of a quarter of its children from elementary schools, was introduced in 1907, and ‘both brought relief to the grammar schools and introduced a greater element of social-class diversification into their structure’ (Lawson and Silver, 1973: 373).

The number of pupils in grant-aided secondary schools rose from 187,647 in 1914 to 470,000 in 1938, and, in line with this rise, the number of teachers working in the schools increased to 24,451 in 1937 (see Appendix 5.4). Graduate teachers and trained teachers also increased in percentage. Nevertheless, until 1937 more than 40 per cent of secondary teachers were involved in teaching without any previous special training for teaching before entering the profession. As discussed in Chapter 3, the need for the training of secondary school teachers was not recognised by the government until 1908 when the regulations for their training were first set.

Employment in elementary schools

Although the pupil-teacher system began to break up from around 1884 when pupil-teachers were able to receive daytime instruction at their teacher centres (Barnard, 1961: 186), it continued to play a central route, along with training colleges, for supplying teachers to elementary schools until the 1920s. The rapid decrease in the number of pupil-teachers between 1908 and 1913, resulting from the introduction of the bursary system in 1907, led to a shortage of certificated teachers. This situation militated against the BoE’s attempt to drive the supplementary (ex-additional female) teacher from the profession. In 1909, the BoE confined the new appointments of

supplementary teachers to infants' classes or schools for older children, and the number of supplementary teachers subsequently fell from 17,204 in 1909 to 13,473 in 1913 (BoE, 1915: 57). Between 1890 and 1910, the number of places provided by training colleges increased from 3,679 to 12,625 (see Appendix 3.4). With this increase, there emerged a situation, as early as 1907, in which a certain number of college students were unable to obtain employment on leaving college. From 1907, the NUT was greatly concerned about the question of over-supply and pressed for the driving out of untrained and uncertificated teachers from the profession, as well as the abolition of the Acting Teachers' Examination.

The proportion of certificated teachers rose from 71.5 per cent in 1921 to 81.9 per cent in 1938 (see Appendix 5.5). The structure of teacher certification, which had been instituted since 1846, changed in the 1920s. As discussed in Chapter 3, with the introduction of the Joint Board system, the government ceased its functions as an examining body and just endorsed qualifications granted by responsible academic bodies. In addition, the Acting Teachers' Examination was abolished after its last sitting in November 1926. Following the announcement, local training groups were organised in connection with universities or university colleges to institute a new Joint Examining Boards certification system. In 1930, the new Joint Board system became operative as a whole for the first time after eighty-four years of government examinations, together with the new CACCT (BoE, 1931a: 61).

Burnham Committee: national salary scales

In the latter part of the nineteenth century under the 1870 Act, there was no central – and usually no local – machinery for negotiating teacher salaries, so the thousands of bodies employing teachers at this time offered salaries on the basis of their own ideas and without a nationally standardised salary scale. This situation began to change with the 1902 Act, which transferred the existing 2,500 school boards to some 300 county councils and county boroughs. Many of the new LEAs, from their inception, sought to place their entire quota of teaching staff on one comprehensive scale of salaries. In the years before the First World War, local associations, supported by the NUT, led salary negotiations on a local basis and pressed for the introduction of progressive salary scales where the fixed wage arrangements, instituted before 1902, had not been replaced. The increasing cost of living at the end of 1912 stimulated the NUT to lead a

national campaign for securing the adoption of the union scale of salaries. This pre-war salary campaign led to an improvement of teachers' salaries in 149 out of 321 LEA areas (Tropp, 1957: 209).

Between 1917 and 1919, the BoE was faced with increasing agitation by teachers, and with a grave shortage of teachers at a time when it had to implement the 1918 Fisher Act, which created the need for at least an additional 20,000 teachers to meet the rise in pupil numbers due to the minimum school-leaving age for all going up to 14 and legislated for compulsory continued part-time education (Dent, 1971: 19). In response, Fisher, President of the BoE, established in September 1919 a Standing Joint Committee on a Provisional Minimum Scale of Salaries for Teachers in Public Elementary Schools, consisting of equal numbers of representatives from the LEAs and the NUT, and two other committees addressing teachers in secondary and technical schools. Two months later, the elementary committee, chaired by Lord Burnham, produced a report recommending a provisional minimum scale of salaries, and continued to formulate complete scales for heads and assistants based on teachers' qualifications.

By December 1920, four standard scales for elementary schoolteachers, which allowed for the differences in the cost of living in different parts of the country, were laid down (see Appendix 5.6). The highest Standard Scale IV was payable in metropolitan areas and the lowest – I – was abolished later in 1936, by rural authorities. National salary scales for secondary schoolteachers were also formulated by the Burnham Secondary Committee, which were allocated to the various areas from April 1921. The four standards scales, although not a single scale, were significant in that they 'provided an easier transition from the multiplicity of locally fixed scales to the post-Second World War period when a uniform system was accepted by both sides' (Gosden, 1972: 45).

Salaries and pensions during the economic recession

The establishment of the Burnham salary scales, which was compulsory for LEAs in 1926, can be regarded as a further improvement of the economic status of teachers, which had been already started with new pension Acts for teachers, such as the Elementary School Teachers (Superannuation) Act 1912 and the Superannuation Act

1918. Under the 1912 Act, teachers were able to participate in their local superannuation schemes. The 1918 Act replaced the 1898 Act and introduced a generous non-contributory scheme, analogous to that for the civil service. It also covered uncertificated teachers and teachers in all grant-aided schools including training colleges, adding 70,000 uncertificated teachers to the scheme (MoE, 1951a: 90; Vaizey, 1957: 15). The improved salaries and pensions made the teaching profession more attractive, and several emergency training schemes for ex-servicemen from 1917 eased the teacher shortage during the war, leading to 1919/20's recruitment being sufficient to replace wastage.

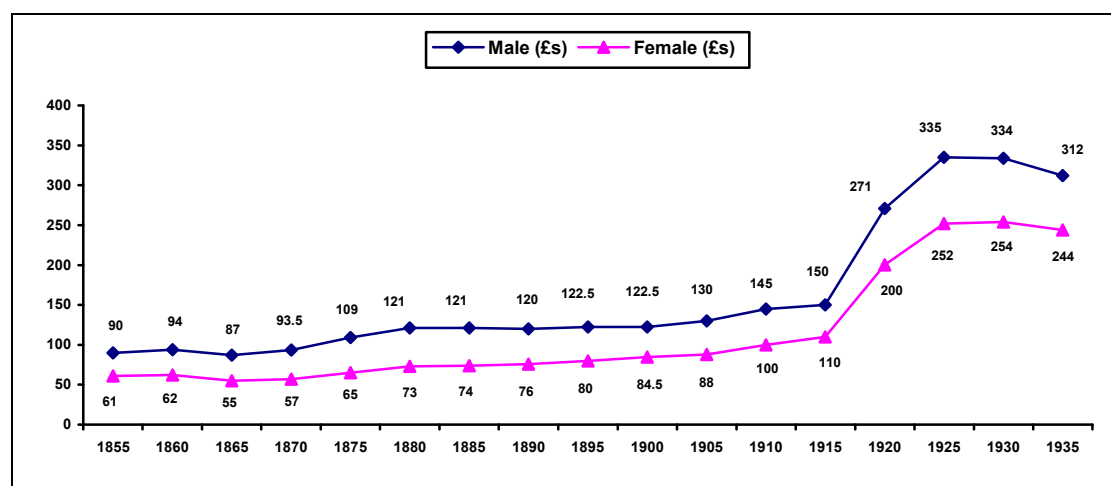
The economic recession of the early 1920s led to unemployment in 1923 among newly certificated teachers (BoE, 1924: 120). In this economic recession, the Committee on National Expenditure (CNE) (1922) proposed – for economic stringency – a 5 per cent salary cut and the transfer of their pensions to a contributory scheme. In 1922, the NUT had to accept this cut, and a temporary charge of 5 per cent of salaries was imposed on teachers as a contribution to the pension scheme, which was later made permanent by the School Teachers (Superannuation) Act 1925 with an equal contribution of 5 per cent from the employer. The economic crisis of the 1930s also led in 1931 to a 10 per cent cut in salaries following the proposals of the May Committee (CNE, 1931). Along with this economic crisis, the Labour government's failure to raise the school leaving age in 1931 required training colleges and departments, which had increased their intakes in preparation for this raise, to reduce them year by year, leaving a substantial portion of newly qualified teachers unemployed until 1938. In general, however, by maintaining a system of national salary scales, 'teachers benefited in the general period of deflation from 1922 to 1939' (Sherington, 1976: 175).

Struggle for equal pay

In the teaching profession, there had been inequality between male and female teachers since the 1846 regime – from their entry into training, women received smaller grants than men and their college places were not subsidised to the same extent. Furthermore, although men and women took the same certification examination and competed in the same field of work, female teachers received smaller salaries. Unequal pay clearly demonstrates the existence of inequality in the teaching

profession. Figure 5.1 shows that the average annual salaries of certificated female teachers between 1855 and 1935 were much lower than those of certificated male teachers.

Figure 5.1. Average annual salary of certificated teachers, 1855-1935



Source: Bergen (1988: 51).

The question of equal pay emerged as an issue after the 1902 Act was implemented. In a few areas where women teachers were strongly organised, such as parts of outer London, equal pay was almost achieved through their salary negotiations with LEAs. From 1904, women teachers started a campaign for equal pay with the foundation of the Equal Pay League, renamed in 1906 the National Federation of Women Teachers (NFWT), as part of the NUT. This campaign brought about acrimonious debate at successive NUT conferences dominated by male executives. It was only after the referendum of members in 1919 that the calling for equal pay was adopted as NUT policy. In the NUT, however, the National Association of Men Teachers, which had changed its name to the NAS in 1920, maintained its opposition to equal pay, which was strongly pursued by the NFWT. This prevented the NUT from being overly involved in the issue, and the NFWT broke away in 1920 to form an independent union, the National Union of Woman Teachers (NUWT).

As discussed, salary policy from 1919 was determined by the Burnham Committee consisting of two panels from the LEAs and the NUT. The Committee, however, did not consider the question of equal pay from the start of its formulating salary scales; the 1920 Burnham scales set women teachers' salaries at 80 per cent of men's. The

NFWT strongly opposed the imposition of unjust salary scales on women teachers, but the female representatives in the Committee were very few; the number of women amongst the forty-six members of the Joint Standing Committee was just five (Gosden, 1972: 109). For the NFWT, ‘the outstanding evil’ of the Burnham scales widely applied from 1922 was the destruction of the existing degree of equal pay that had been already secured in some areas (Phipps, 1928: 86). Along with the question of unequal pay, a marriage bar also operated as an arrangement threatening women teachers’ status – before the First World War, a marriage bar was operated by about one-third of LEAs, and between 1921 and 1923 it was introduced by the vast majority of LEAs in a panic response to teacher unemployment and education cuts. During the Second World War, married women were encouraged to enter into teaching and the marriage bar was outlawed by the 1944 Act (Oram, 1989: 24).

Rise in the status of teachers and in-service training

After the 1902 Act, there was a substantial rise in the status of teachers. Clause 17(4) of the 1902 Act enabled teachers to sit on the Education Committee, and elementary teachers having at least eight years’ teaching experience became eligible for appointment to a new class of ‘Assistant Inspectors’, replacing the ‘Junior Inspectors’ in 1913. During the period between the wars, an increasing number of teachers or ex-teachers were chosen as candidates for municipal or parliamentary office, and, as noted, from the 1920s the teaching profession became more secure and better remunerated than ever before through the introduction of the Burnham scales that ensured a national minimum level of salaries and the expansion of pensions for teachers. In particular, the change in the head of the education department influenced the relationship between the NUT, LEAs and the BoE: Robert Morant, whose policies and elitist views produced the wrath of the NUT, resigned in 1911, and his successor, Selby-Bigge, and J. A. Pease, appointed as President of the BoE in 1911, ‘were both determined to improve relations with the teaching profession’ (Sherington, 1976: 172). Under Fisher and Selby-Bigge, the relationship between the three parts was cordial and cooperative, and Selby-Bigge’s successors continued this tradition of cooperation with the ‘friendly and conspiratorial’ triumvirate (Tropp, 1957: 215).

In-service education and training (INSET) can be understood as a stage following the first stage of initial teacher training. However, relatively little has been written about

the early development of INSET in Britain. According to Edmonds (1967: 243), in the late eighteenth century a small number of outstanding charity schoolmasters attempted to formulate courses to raise their own standards of proficiency, and teachers in some areas such as East Yorkshire and North Lincolnshire met together to discuss common problems. In the nineteenth century, the parent voluntary bodies undertook the organisation of courses for serving teachers and the National Society employed a small body of peripatetic masters and mistresses, some of whom demonstrated first-rate teaching and organisational skills (almost everyone ended up as the head of a large school or, in the case of men, as clergy after taking Holy Orders). Furthermore, during the period of the payment by results system, the DSA organised, on a limited scale, demonstrations and summer schools for teachers, and school boards also ran courses for their teachers in the grant-earning subjects.

The courses during the period of payment by results focused on the prospect of improved examination performance by pupils for more grant-earning, and were provided by employers such as the ED and school boards, not by the teachers' associations themselves. This INSET tradition, arranged by the employers, was continued in the twentieth century. In the early years of the twentieth century, the development of in-service training was stimulated by the establishment of one-year 'supplementary courses' to provide teachers with two years of initial training, with the opportunity of a third year. In 1925, a departmental committee (BoE, 1925: 121) raised the need for arrangements to be made for all teachers to attend the supplementary courses at regular intervals of a few years. The provision of this type of in-service training was slow but steadily increased up to the outbreak of the Second World War (Henderson, 1977: 165). In addition to the supplementary courses, other short courses such as vacation courses and summer courses were shown in annual BoE reports. Vacation courses were organised by the BoE mainly for teachers in rural areas, and summer courses were led by the BoE, LEAs, universities and other bodies (BoE, 1925: 119). The McNair Committee reported that in 1938 'approximately 7,000 teachers attended short full-time courses, 700 attended term courses and 47,000 part-time courses' and that 'courses in physical education, pedagogy, handwork, art and music, in that order, are most in demand, or at any rate are most fully provided' (BoE, 1944b: 17).

5.2. Policies in the Post-War Era Governments

5.2.1. Teacher employment and qualification in the post-war period

Teacher qualification under the 1944 Act

Besides the changes in the structure of schooling, the 1944 Act brought about a change in the structure of qualification for teachers (see Appendix 5.7). As discussed, until the passing of the 1944 Act, teachers intending to work in the public elementary schools established by LEAs were required to have some form of recognition before they could be appointed. By contrast, there was no statutory requirement for those who wanted to teach in a secondary school; there existed just a strong preference for graduates. There had been four main categories of teacher before 1944 and the three categories of the uncertificated, supplementary and pupil/student teacher had been actually eliminated from the Second World War onwards. The need for the reform of teacher qualification was raised in advance by the McNair Committee. As to the recognition of teachers, it recommended that ‘the Board of Education should recognise only one grade of teacher, namely the grade of “qualified teacher”... a qualified teacher should be a teacher who has satisfactorily completed an approved course of education and training’ (BoE, 1944b: 45). Instead of the term ‘certificated teacher,’ which was pertinent only to elementary schools, the Committee preferred to use the term ‘qualified teacher’ to be extended to all schools (BoE, 1944b: 43).

This recommendation for the qualified teacher terminology was realised by the 1944 Act. Under the 1944 Act and subsequent regulations, three main categories of teacher emerged – qualified, temporary and occasional teachers. Since their first appearance as one set of regulations in 1945, the Primary and Secondary Schools Regulations ‘required that all teachers in maintained and assisted schools should, with the exception of temporary and occasional teachers, be qualified’ (MoE, 1951a: 79). However, the requirement for QTS was not applied to those teachers in independent schools. QTS was awarded to those who had completed – to the Minister’s satisfaction – an approved course of training, or possessed such special qualifications as the Minister may approve (MoE, 1962c: 72-73). Temporary and occasional teachers were non-qualified teachers. Temporary teachers were those candidates who

took up a teaching post whilst awaiting entry to a course of teacher training. Occasional teachers were those employed to fill casual vacancies or in an emergency when qualified teachers were not available. All those who had previously had the status of certificated teacher now became qualified teachers. In addition, those teachers employed as uncertificated and supplementary teachers before the 1944 Act were allowed to continue in service and some acquired QTS by virtue of long service.

The NUT was anxious to prohibit both unqualified teachers and untrained graduates from being employed in schools. At the 1954 conference, Sir Ronald Gould, General Secretary of the NUT, said that the Union faced three tasks: 'first, the complete elimination of the category of temporary teachers, secondly, insistence on training for all graduates, and thirdly, an embargo on even the temporary employment of the untrained' (Gould, 1954). However, the 1944 Act did not bar non-qualified teachers from being employed in schools; there were still thousands of non-qualified teachers employed during the 1950s and 1960s. This situation began to change with the Schools (Amendment) Regulations 1968 which replaced, from September 1968, the existing categories of temporary and occasional teachers with two new categories – student teachers and instructors – and confined the new appointments of unqualified teachers to these two categories.

The category of student teachers contains former temporary teachers and instructors that are 'teachers not employed in a general capacity, but who possess specialist knowledge of a particular art or skill (e.g. music, sport) who are employed only where qualified teachers of that art or skill are not available' (DES, 1972c: xv). The Schools (Qualified Teachers) Regulations 1969 enabled some of the existing unqualified teachers to be granted QTS by the individual approval of the Secretary of State on the basis of length of service or the possession of a qualification, or both service and qualification. Certain teachers whose uncertificated service before 1 April 1945 did not entitle them to QTS were granted QTS on completion of twenty years' service – between 1968 and 1970, 1,379 former uncertificated and supplementary teachers were granted QTS (DES, 1972c: ix). In this situation, the number of non-qualified teachers rapidly fell from 6,303 in 1968 to 2,364 in 1969.

The 1970s witnessed a major step towards a fully qualified and trained teaching profession with the introduction of a training requirement for graduates and holders of other qualifications. In September 1969, the Secretary of State announced that those graduating after 1st January 1970 would have to train before teaching in primary schools, while graduates after 1st January 1974 would have to train before taking posts in secondary schools (DES, 1970a: 31-32). However, there was also an exception for teacher-shortage subjects – between 1973 and 1983, persons possessing degrees in mathematics and science were approved for teaching in secondary schools without training because there was an inadequate supply of trained teachers for these subjects (DES, 1983b: 21-22).

Teacher employment

With the growing school population in the post-war era, there was an excess demand within the teacher labour market by the mid-1960s, leading England to experience a longstanding teacher shortage (Thomas, 1973: 16). To address this teacher shortage, the government, under the post-war partnership strategy, established the NACTST in 1949, which largely consisted of representatives of the ATOs, teachers' associations and LEAs, and empowered the council to advise on the matter of the future supply of teachers. In 1951, the council produced its first report (MoE, 1951b), which provided an optimistic view on the growth in the numbers of teachers, together with firm projections for the training and supply of teachers to 1954. With the growing teacher shortage in the late 1950s, the council was more concerned with the question of long-term teacher supply, taking the outlook that there would be serious teacher shortages until 1980 (MoE, 1962e). However, its ninth report (DES, 1965b) reflected the peak of different opinions among its members, and by 1965 its advisory role was considered superfluous by the government (Hicks, 1974).

The lengthening of teacher training courses in colleges of education in 1960, which produced over 80 per cent of trained teachers, brought about a radical decrease in the number of newly-trained teachers in 1963, particularly female teachers. In 1965, with the disbandment of the NACTST, the government, under the Keynesian intervention strategy, intervened directly in teacher supply by setting a national target of an increase of 20 per cent in the national intake to initial training courses under previous plans by 1968, and colleges and institutes of education were asked to 'make every

effort to ensure that a substantial start was made with the necessary measures in 1966-67' (DES, 1966b: 64). With the continual increase in the number of entrants to teacher training courses until the late 1960s, teacher supply was also in the process of stable increase, which eased the teacher shortage. From the second half of the 1960s, the shortage began to disappear quite rapidly, and in the 1970s there emerged a surplus of teachers in the teacher labour market for the first time since the war (Zabalza, 1979).

With the growth of the school population, the raising of the school leaving age in 1947 and in 1973, the reduction in class sizes, and growing participation in the sixth-form, the number of teachers employed in all maintained schools increased consistently under the post-war era governments (see Appendix 5.8). Following the 1944 Act, secondary schools during the 1950s developed on the basis of the tripartite school system, and the number of teachers employed in these secondary schools grew from 72,872 in 1950 to 112,494 in 1960. From the mid-1960s, there were contrasting changes in the number of teachers serving in modern and comprehensive schools. The number of teachers in comprehensive schools rose from 11,317 in 1965 to 195,811 in 1978, but the number in modern secondary schools fell from 72,658 to 21,676 in the same period. This change in numbers reflects the results of the comprehensive reorganisation initiated in 1965 by the Wilson Labour government (see section 4.2.2). The average proportions of women teachers in the primary schools during the three decades marked a continual rise in percentage of 72.9 in the 1950s, 74.2 in the 1960s and 75.5 during 1970-1978, while in the secondary schools they marked an irregular change in percentage of 44.6, 41.9 and 43.6 during the same periods. The proportion of trained teachers rose in percentage to 92.5 in 1978 from 88.0 in 1950.

5.2.2. Changes in working conditions

Provisions of the 1944 Act for enhancing working conditions

Under the post-war partnership strategy, the post-war era governments were concerned with enhancing teachers' working conditions. The location of the ultimate power to appoint and dismiss teachers, which had not been made clear by law due to a complicated educational history, was first laid down by the 1944 Act. Under Section 24 of the Act, the power rested with different bodies according to the types of school.

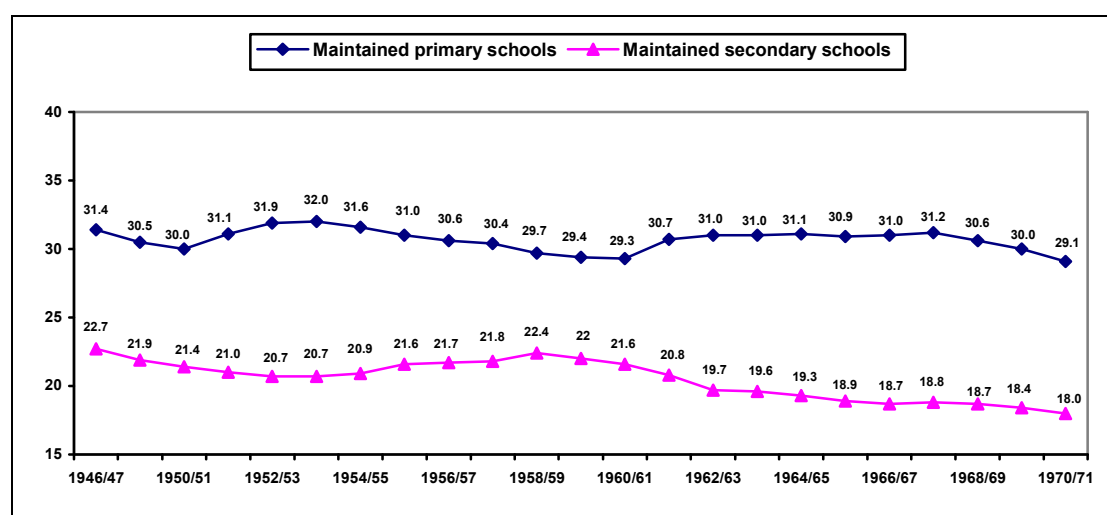
In a county school the LEA had complete control over the appointment and dismissal of teachers. In a voluntary controlled school or a voluntary special agreement school the LEA had complete control over the dismissal of teachers, but only partial control over the appointment – the rules of management or articles of government might lay down special conditions of appointment, and managers and governors had a say in the appointment of ‘reserved teachers’. In a voluntary aided school the rules of management or articles of government made provision for the appointment of the teachers by the managers or governors of the school, enabling the LEA to determine the number of teachers to be employed, prohibit the dismissal of teachers without the consent of the authority and require the dismissal of any teacher.

The end of the marriage bar was another important change brought about by the 1944 Act. As discussed, the marriage bar was widely operated by the LEAs until the 1920s. Under the marriage bar, a female teacher was forced to leave her school once she got married, which effectively barred married women from entering the teaching profession. The marriage bar was weakened during the Second World War and the 1944 Act officially put an end to it. It was laid down under Section 24(3) of the Act that ‘no woman shall be disqualified for employment as a teacher in any county school or voluntary school or be dismissed from such employment by reason only of marriage’. The abolition of the marriage bar had a striking effect on the proportion of married women teachers; the proportion of married women teachers among all women teachers in maintained primary and secondary schools rose from one-twentieth in 1939 to one-third in 1954 (Dent, 1957: 36). The 1944 Act, on the one hand, introduced compulsory worship and instruction into all statutory schools but, on the other hand, it provided the provision of Section 30 for protecting teachers from being affected by reason of their religious convictions or practices, which had been a long-standing fear among teachers, particularly those employed in voluntary schools.

In the years after the war, large classes and poor buildings were the major issues affecting the working conditions of teachers. This question was also addressed by the McNair Committee with the recommendation for a reduction in the size of classes (BoE, 1944b: 25). It was the Schools Regulations 1959 that laid down a statutory provision for class sizes. Under the regulations, the number of pupils in any class was limited to thirty for a nursery class, forty for a primary school class and thirty for a

secondary school class. However, this provision was repealed in 1963, and since then the concern has been with pupil-teacher ratios without statutory provisions for class sizes (Adams, 1984: 191). As Figure 5.2 shows, the average pupil-teacher ratio in primary schools fell from 31.4 in 1946/47 to 29.1 in 1970/71 and in secondary schools from 22.7 in 1946/47 to 18.0 in 1970/71. Nevertheless, these ratios at both primary and secondary levels did not decrease in a continuous process. The fact that pupil-teacher ratios in primary schools were much higher throughout the period than those in secondary schools reflects the longstanding view crystallised in British national practice that ‘large classes are more tolerable amongst younger than amongst older children’ (BoE, 1944b: 25).

Figure 5.2. Pupil-teacher ratios, 1946-1971



Source: DES (1973c: 4-5)

The basic scale for all qualified teachers from 1945

Until 1944, through collective bargaining from 1919 between teachers’ unions and their local authority employers, there were three salary scales for teachers in elementary schools. Scale I was abolished in 1936; Scale IV was in force in the London area; Scale III was predominant in county boroughs; and Scale II was largely for predominantly rural areas. There were two scales for teachers in secondary schools: ‘a London scale for the London County Council, Middlesex, East Ham, West Ham and Croydon, and a provincial scale for the rest of the country’ (BoE, 1944b: 32). There were arrangements both for the payment of headteachers and for the modest additions made to the salaries of some secondary school teachers in regarding

special responsibilities, special qualifications or service of exceptional value. These arrangements were also extended to elementary schools (BoE, 1944b: 32).

The post-war social democratic consensus in the world of education was already germinating before the 1944 Act under the growing egalitarian view on schooling – much encouraged by the effect of wartime conditions – which facilitated the introduction of a common salary scale for all qualified teachers in 1945. By 1935, one single national scale for teachers was given support by Sir Frederick Mander, Secretary of the NUT, and became NUT policy in 1939 (Saran, 1985: 88). The Spens Committee first addressed the salary structure in its report, and suggested that the two types of secondary schools, that is, grammar schools and modern schools, should no longer be an automatic determinant of the salary scale applicable to the teachers serving in these schools (BoE, 1938: 297-298).

During the years following 1939, much attention was paid to reconstructing the whole system of education, and the egalitarian view on schooling was furthered by subsequent documents (BoE, 1941: 63; 1943a: 9). This view gave an implicit support to the argument that all teachers should be paid on a common salary scale. In the end, a clear recommendation for a common salary scale for teachers was made by the McNair Committee:

We consider that there should be one basic salary scale for those who are recognised by the Board of Education as qualified teachers...Under this arrangement the salary scale of a teacher would be the same in whatever type of school he or she was serving, except for additions for special qualifications or responsibilities or for serving in the London area.

(BoE, 1944b: 41)

The basic scale recommended by the McNair Committee was introduced in 1945 under the regime of the 1944 Act. Section 89 of the Act gave the Minister of Education powers over the future Burnham machinery arrangements, and made future recommendations from the Burnham machinery mandatory by statutory order. The 1944 Act brought a new statutory three-stage system of education – primary, secondary and further – dividing elementary education between primary and

secondary at the age of eleven. Following the Act, of the three Burnham Committees, the elementary and secondary committees were replaced with a new unitary body, the Burnham Main Committee, with the Burnham Technical Committee remaining distinct (MoE, 1951a: 89). Under the post-war partnership strategy, the post-war era governments enabled the new Burnham Committee to continue to operate as an independent negotiating body for teachers' salaries.

Policies on salaries and career structure until the 1950s

The basic scale established the teaching profession as a newly unified profession, and, despite many successful changes, maintained its primary nature as a common basic scale until 1970. Under the 1945 settlement (MoE, 1945), the distinctions between former elementary and secondary teachers were abolished, and all full-time qualified assistant teachers³² in maintained primary and secondary schools were paid according to the basic scale. Although the sex differential still existed with two basic scales – one for men and one for women – all the teachers were given equal annual increments with a range of 15 years for men and 13 for women. In addition to the basic scale, allowances could be awarded for personal qualifications, special work and special posts such as a graduate addition, allowances for teachers working in special schools or classes, allowances for teachers working in the London area, allowances for posts of special responsibility (PSRs), and allowances for headteachers.

Under the 1945 settlement, these PSR and headship posts were the promotional prospects open to teachers, and were mainly influenced by the number and age of pupils on the school roll. In particular, the differential placed on pupils of fifteen and over, as Hilsum and Start (1974: 26-27) put it, 'effectively separated grammar schools, with their fifth and sixth forms, from the secondary modern schools, which at that stage did not have children over fifteen, and from the primary schools'. During the years 1945-59, increases in the basic scales '[were] generally [justified] by the rising cost of living and the general increase in wage and salary rates that occurred in that period' and 'changes in the allowances were intended to increase the differentials between various groups of teachers' (Conway, 1962: 157).

³² Under the 1945 settlement, there were three categories of assistant teachers, that is, qualified, unqualified and temporary teachers, and each category had its own scale. Also, there were five grades for qualified headteachers and each grade had its own scale.

The 1945 settlement was followed by succeeding settlements reached by negotiations between the two panels in the Burnham Committee – the authorities’ (management) panel and the teachers’ panel (see Appendix 5.9). During the period between 1948 and 1959, five general settlements were made through the Burnham machinery. Among these settlements, major changes in the salary and career structure were made by the 1948 and 1956 settlements. Under the 1948 settlement (MoE, 1948a), the school size was estimated by a ‘unit total,’ which was the total number of points assigned to a school. This unit total system increased the number of groups of schools, which accordingly increased the differentiation between headteachers. Furthermore, this system, as with the 1945 settlement, encouraged grammar schools to develop their sixth forms, which would ultimately provide a higher salary for the heads and more opportunities for PSRs for assistant teachers. Another beneficial knock-on effect was that the government also was able to ease the problem of pupils prematurely leaving grammar schools at this time.

The 1956 settlement (MoE, 1956b) witnessed four important major changes. First, equal pay³³ between men and women was initiated, with progressive completion by 1961. Second, the PSR was expanded from being a single status into thirty-nine different status levels. Third, three new types of post – graded post, head of department and deputy head – were distinguished within the school’s chain of command. Lastly, the unit score for pupils between thirteen and fifteen changed from one to two points, which increased the unit totals of all secondary schools and particularly doubled those of secondary modern schools. The 1956 settlement is important in that it established for the first time a well-defined hierarchy of promoted posts in English schooling. However, as Dennison (1980: 228) put it, ‘all benefits of the 1956 reorganization were restricted to secondary schools, and although more promoted posts did become available in secondary moderns as many, if not more, were generated in grammar schools’.

³³ Equal pay in every sector was instituted by the Equal Pay Act 1970, aiming to prevent discrimination regarding the terms and conditions of employment between men and women.

Policies on salaries and career structure since the 1960s

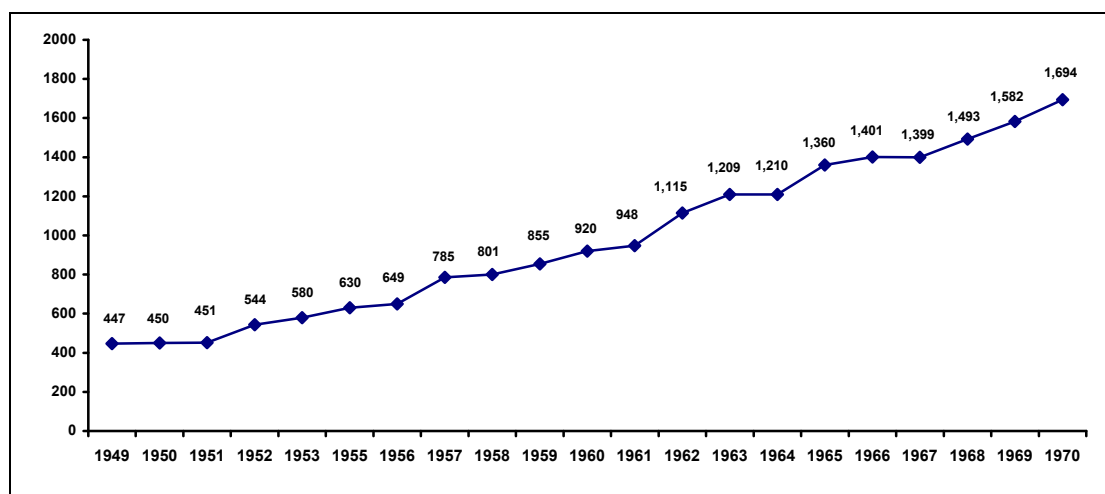
From 1961 to 1970 there were six general settlements, and one special salary award was made in 1970 (see Appendix 5.9). During the period, three basic scales for non-graduates, ordinary graduates and good honours graduates, are shown on the Burnham Reports, but in effect these were not different from the previous single basic scale with additions for a degree and a good honours degree. Of these six settlements, not one of them brought about a radical change in the salaries structure except the 1965 settlement (DES, 1965c), whereby separate scales for headteachers were introduced. A notable change occurred in the area of the Burnham negotiations system. Under the 1944 Act, the Minister had the power just to approve or reject the entire settlement agreed by the two panels. During the later 1950s, teachers' unions had shown growing discontent with the Burnham awards and the lack of provision for backdating (Thornton, 1982: 384). Frequent impasses in negotiations finally initiated the Minister's intervention during the 1959 Burnham negotiations, and this precedent intervention was followed by subsequent intervention in the Burnham negotiations between 1961 and 1963.

In 1961, the two panels reached an agreement on an award to be effective in January 1962. However, under the pay pause policy, introduced in 1961 under the Macmillan government in an attempt to moderate increases in the public and private sectors (Thomas, 1973: 14), David Eccles put into effect a smaller increase than had been agreed by the two panels. In 1962, the Burnham Committee reached an agreement on an award to become effective in 1963, but the Minister rejected the award and, with an intention to lower the high wastage rates among experienced teachers by widening salary differentials, tried to change the distribution of the agreed award in favour of the longer-serving and more highly qualified teachers. This rejection evoked protests among members of both panels, but the Conservative government supported the Minister's decision by passing the Remuneration of Teachers Act 1963, enabling the Minister to impose the salary settlement with a lower basic scale and higher maximum scales.

These two instances of ministerial intervention in the early 1960s broke down the status of the Burnham Committee as an independent negotiating body, and a need to restructure the Burnham negotiations system was raised. In the end, this led to the

Remuneration of Teachers Act 1965 after a series of conflicts between the government and the Burnham Committee. There were some major changes made by the 1965 Act – the Secretary came to have direct powers in the negotiations process through two representatives of the DES included in the management panel; the Act enabled the Secretary to arrange for arbitration in the event of a negotiations deadlock; and a provision allowing for the backdating of awards was introduced. However, the Act did not contribute to smoothing succeeding negotiations. The necessity of the prior approval of the Secretary as to the management panel's proposals and the Wilson government's strict incomes policy militated against flexible negotiation and the resort to arbitration up to the early 1970s.

Figure 5.3. Average annual salaries of teachers, 1949-1970 (£s)



Source: Thomas (1973: 15)

With a series of Burnham settlements, average salaries between 1949 and 1970, as shown in Figure 5.3, were continually increased, except the salaries of 1967 which reflects the effect of the pay freeze in the period. In the late 1960s, teachers' salaries compared with the average wages of non-manual male workers began to fall sharply in all three relative salary aspects, average salaries and the relative minimum and maximum salaries on the Burnham basic scale (Thornton, 1982: 389). In this period, teachers' growing discontent with salaries was expressed with the emergence of militant action. In October 1969, the teachers' panel claimed a flat-rate interim increase of £135, representing an 8 per cent rise, at a time when the Wilson government incomes norm under the incomes policy was set at 3.5 per cent. After

seven rounds of negotiation meetings, the Burnham Committee finally reached an agreement on a £120 interim increase for April 1970 (Saran, 1985: 103).

In the 1970s, the Burnham round became an annual event from being a biannual one in the 1960s, and major changes in the salary and career structure were made by the settlements between 1971 and 1974. The 1971 settlement (DES, 1971a) brought two major changes. First, the single basic scale introduced by the 1945 settlement was changed into five consolidated scales, and the application of these scales in schools was determined by the points score based on the unit total. Second, separate scales for deputy headteachers were introduced following the introduction of scales for headteachers in 1965. The 1972 settlement (DES, 1972d) created a new post of senior teacher with a separate scale. This post was available in schools of Group 10 or over and up to three posts per school.

The 1974 settlement (DES, 1975c) reduced the five consolidated scales to four consolidated scales and, instead, added separate scales for senior teachers to the hierarchy of these scales. The unit total system introduced by the 1948 settlement continued its existence as an age-weighted system until the 1970s, but this system consistently favoured secondary teachers – in 1975, the proportion of the profession on scale 1 was 41.0 per cent in primary but just 26.9 per cent in the secondary sector (DES, 1977f: 44-47). The 1974 settlement changed slightly its unit allocation to each pupil from that in 1969 to reduce units for older children – each pupil under 13 counted as two units, from the original 1.5; each pupil aged 14 and under 15 counted as three units, from 2; and each pupil aged 17 and over counted as eight, from 10.

5.2.3. In-service training

In-service training by the 1950s

As discussed in Chapter 3, the McNair Committee recommended university schools of education as ATOs for an integrated training service. These schools (institutes) of education were expected not only to assume responsibility for initial training, but also to ‘organise and provide accommodation for refresher and advanced courses’ and to become ‘the centre of the professional interests of practising teachers’ (BoE, 1944b:

53). In addition, the Committee raised the need for the future expansion of in-service training with this statement:

Our view is, however, that when circumstances make it practicable, every teacher who makes suitable proposals for the use of the period should be allowed a sabbatical term on full pay after five years' continuous teaching, and that, where the circumstances and proposals of the teacher warrant, the period should not be limited to one term.

(BoE, 1944b: 28)

There were three main courses of in-service training by the early 1950s when the ATOs were at their early stage (Richardson et al., 1953): supplementary courses, special courses, and short refresher courses. Supplementary courses at this time were, in their general nature, similar to the old third year supplementary courses intended principally for non-graduate qualified teachers selected carefully for the provision of one-year full-time training on a specialist subject basis, but they were now largely held in institutions other than the recognised training colleges. The operation of these supplementary courses depended on the special needs of the schools and the financial circumstances of the Ministry. Students for these courses were selected according to ability, and, for the practising teacher, his local authority's willingness to second him on full salary was a determinant factor. There were 301 teachers attending these courses in 1948 (MoE, 1949: 60), which increased to 1,930 in 1959 (MoE, 1960b: 65).

As a post-war innovation, special one-year courses were 'planned to provide advanced work in particular fields of education and were restricted to teachers of experience who could reasonably seek to equip themselves for more responsible posts, such as lecturers' posts in training colleges' (MoE, 1949: 60-61). By 1955, the MoE paid the serving teacher admitted to the courses a grant for tuition and maintenance of not more than £300 a year. These courses were organised almost entirely by university institutes and UDEs, mostly leading to the award of a diploma and often to subsequent promotion or transference to specialised work (Hinchliffe, 1961: 85). From the mid-1950s, these special courses, together with supplementary courses, were increased by the introduction of a new secondment system in 1955, whereby LEAs pooled a proportion of the costs of sending their teachers on these courses: in 1954

there were sixty-seven teachers attending twelve one-year courses (MoE, 1955: 39) and in 1959 the number increased to 263 teachers attending twenty-four one-year courses (MoE, 1960b: 65).

Short refresher courses were mainly for practising teachers, but were also open to staff in other educational institutions such as training colleges. As with the short courses during the pre-war period, these courses were provided on a large scale by various bodies including the MoE, LEAs, ATOs and professional associations. The courses varied in length, but were mostly over two weeks. By the 1950s, the MoE's courses involved a large pedagogical element and became available to teachers in towns and cities. During the late 1950s and early 1960s, the LEAs' short courses were on the increase through the encouragement of the Minister. They were run on an ad hoc basis to meet current need or demand – such as the teacher shortage in the fields of crafts, music, physical education and science – and were mostly organised for evening or weekend attendance (Hinchliffe, 1961: 93-94). The ATOs also began to plan short refresher course programmes covering much the same as the courses run by the Ministry and the LEAs. Professional associations, including the NUT, organised about forty refresher courses independently or in collaboration with LEAs each year in the late 1950s, taking the form of large meetings of between 500 and 3,000 for two or three days (Henderson, 1977: 167).

Expansion of in-service training by the early 1970s

In line with educational expansion during the post-war period, the provision of in-service training was also expanded. In the 1960s the government, under the intervention strategy, led the expansion of in-service training through a series of documents. The Newsom Report (MoE, 1963a: 108) raised the need for the wider provision of in-service training in the secondary sector, with a recommendation that 'an emergency programme of in-service courses should be instituted for graduates and other teachers who have obtained qualified status without training'. In a circular, the government stated that 'the time has now come to expand and develop the established arrangements for the further training of serving teachers to meet the needs of the greatly enlarged teaching force of the future' (DES, 1964: para. 1). In the primary sector, the Plowden Report (DES, 1967a: 363) made more comprehensive recommendations on in-service training including the availability of BEd degree

courses to serving teachers, the continuation of the expansion of one-year advanced and one-term full-time in-service courses, a substantial period of in-service training for every teacher at least every five years, the requirement for LEAs to submit plans for in-service training, and no financial penalty for teachers for their attending short courses.

Along with this emphasis on in-service training, three major surveys showing what was happening in in-service training in the 1960s were conducted by different organisations: the Plowden Committee's National Survey included some information on attendance at in-service training courses over three years from 1961/62 to 1963/64 (DES, 1967b: 230-240); the NFER survey focused on attendance over the three years from 1964/65 to 1966/67 and on teachers' views and preferences (Cane, 1969); and the DES survey reported information on in-service training courses provided for teachers during the academic year 1966/67 and on teachers' experience of courses over the same three years studied in the NFER survey (DES, 1970b). In terms of the distribution of the number of in-service training courses and their attendance in 1966/67, the DES survey shows the predominant role of the LEAs in providing 69.2 per cent of the total number of courses, with short and very short courses contributing the majority of attendance (see Appendix 5.10).

Between the 1960s and the early 1970s, developments in the area of in-service training included the emergence of television as an in-service training medium, the foundation of the Open University and its commencement in 1973 of post-experience courses appropriate for serving teachers, and the introduction of the so-called ATO/DES or ATO/HMI courses by Letter 2/70 (Henderson, 1978: 32). Besides these developments, one further thing to note is the rapid spread of teachers' centres during the period. The general picture of the teachers' centres is given by Thornbury (1973), Adams (1975) and Redknap (1977). A few centres were already set up in the early 1950s, but the major impetus came in the 1960s with both the establishment of the SCCE and the start of the Nuffield Foundation's projects in mathematics and science in 1964, which focused on curriculum development. In addition, the plan for the raising of the school leaving age to 16 stimulated the SCCE to publish Working Paper 2 (SCCE, 1965), recommending the setting-up of 'local development centres'. From 1965 onwards, LEAs began to establish teachers' centres, which rapidly increased in

number to between 500 and 600 in 1972 (Weindling et al., 1983: 15). The SCCE saw the centres as a primary agency for local curriculum development (SCCE, 1967; 1970), and a small team of field officers was employed for liaison purposes (SCCE, 1974). On the other hand, LEAs in many cases tended to regard them as centres for their own in-service training activities (Pollard, 1970).

The government intervened more actively in the provision of in-service training by suggesting the setting of national targets. The James Report aimed to bring a close interaction between initial and in-service training. To this end, a three-cycle model describing the education and training for teachers was proposed (see section 3.2.5). Among the three cycles, much attention was paid to the third cycle (DES, 1972a: 5), and the Committee recommended entitlement to release for in-service training for a minimum of one term in every five years following an interim target of one term in every seven years (DES, 1972a: 12). This recommendation was supported by the White Paper produced in the same year. In the Paper, the government suggested a national target for in-service training of '3 per cent release by 1981' (DES, 1972b: 18). However, the James Report and the White Paper could not bring about the expected progress in in-service training. As discussed in Chapter 3, the economic depression from 1973 led to financial cuts in public spending and the contraction of training targets. The reorganisation of local authority boundaries in April 1974 saw a reduction in the number of LEAs, which led LEAs to become larger and more powerful educational units assuming increased responsibilities for the provision of in-service training to a greater extent than hitherto (Taylor, 1973).

The growth of BEd courses for serving teachers in the 1970s is also worth noting. As discussed in Chapter 3, the BEd for initial teacher training was introduced from 1964 following the Robbins Committee's recommendations. According to Evans (1980: 12-24), in the early 1970s, a few universities began to validate BEd courses for serving teachers following expressed demand from the NUT in 1968. The CNAA's first BEd in England was for serving teachers with a start at Sunderland Polytechnic in January 1973, which eventually grew to the extent that in January 1979 there were 6,740 teachers following in-service BEd courses, of whom 6,253 were following a part-time and 487 a full-time course. The falling birth rate from the mid-1960s helped schools to release teachers for the BEd more easily than at the time of teacher shortages.

5.3. Policies in the Thatcherite Governments

5.3.1. IILs

Collapsing Burnham system

The economic depression after the 1973 oil crisis led to a contraction in most fields of education, putting an end to the post-war expansion. On the one hand, this economic depression acted as an encouragement for the Wilson-Callaghan Labour governments to legislate a series of laws including the Sex Discrimination Act 1975, the Employment Protection Act 1975 and the Employment Protection (Consolidation) Act 1978 to secure a stable standard of working conditions for people. On the other hand, the 1970s witnessed the decline of the Burnham negotiations system. During the mid-1960s, teachers were paid the highest relative wages compared to average non-manual earnings and national average earnings, but after that there was a considerable deterioration in the period up to 1973 (Dolton, 2006: 1095). Moreover, strict wage controls by the statutory incomes policy restricted the flexible operation of the Burnham system, which led to its usual difficulties in the annual negotiations process, raising questions about the efficiency of the Burnham negotiations system.

In this situation, two special adjustments in teachers' pay were made between 1974 and 1980 following the recommendations of two special committees appointed under the Labour government to inquire into the matter of teachers' pay. In December 1974, the Houghton Committee (DES, 1974b: 72) recognised that teachers were indeed underpaid – largely due to very limited opportunities for salary advancement in comparison with other professions – and recommended a 29 per cent increase for the average teacher. This special adjustment brought substantial gains to teachers, but high inflation and the pay limits set by the incomes policy quickly offset these gains (Thornton, 1982: 388). The Clegg Commission, appointed in March 1979 as a standing commission on pay comparability (SCPC), started in July the work for the second special adjustment and recommended in April 1980 salary increases for teachers ranging from 17 to 25 per cent, with the average increase set at 18.2 per cent (SCPC, 1980: 33).

These two special adjustments contributed to raising the whole level of salaries for teachers. They were, however, led by the special committees outside the framework of the Burnham system, which reflects the declining status of the Burnham system as an independent negotiating body. In addition, from its inception, the Burnham Committee was organised for the matter of salary negotiations between teachers and LEAs. Therefore, conditions of service for schoolteachers other than salaries could not be negotiated. Following the school meals agreement in 1968, there emerged a move toward the codification of conditions of service between employers and teachers' unions, which in the mid-1970s created the joint committee of the Council of Local Education Authorities/Schoolteachers' Committee (CLEA/ST) (Fredman and Morris, 1987b: 216). In November 1978, after reaching collective agreements, this committee produced the first edition of a booklet (CLEA/ST, 1978) on conditions of service for schoolteachers (the so-called Burgundy Book). The declining Burnham system and the emergence of a national negotiating body for conditions of service acted as a preliminary stage towards a unified system for salaries and conditions of service in the 1980s, reflecting a more centralised control over the teaching profession.

A growing notion of school-focused in-service training and teacher appraisal

The economic depression, falling school rolls and financial cutbacks since the mid-1970s led to new demands for changes in the pattern of professional development, of which the emergence of school-centred staff development and training and the growing need for teacher appraisal are particularly worth noting. In the 1970s, the traditional types of in-service training provided by external institutions met the criticism that their actual benefits to the school, if not to the teacher, were often minimal as the programmes planned and organised by external institutions tended to fail to pay enough attention to the needs of schools and the teachers serving in them (Morant, 1981: 26-27). In this situation, the school-centred (based/focussed) in-service training, seeing the school as a base for in-service work, began to be drawn to wider attention by scholars (Warwick, 1975; Henderson, 1979).

Early support for this style of in-service training was given by the James Committee, with the argument that 'in-service training should begin in the schools' (DES, 1972a: 11). In the late-1970s, the decline of the SCCE and the general contraction in education had a deleterious effect on the teacher centres movement, and school-based

in-service training came to receive much more attention (Hopkins, 1986: 85). In 1974, ACSTT emphasised individual teachers' needs for INSET by suggesting a 'career scenario' to illustrate the likely needs of individual teachers for INSET at different points in their teaching life (DES, 1974c). In 1978, it placed a new emphasis on the role of schools in INSET through two booklets (DES, 1978d; 1978e). In the booklets, ACSTT saw the induction of NQTs as 'the first part of the continuous process of professional development of staff in a school' (DES, 1978d: 4) and 'the first step of INSET' (DES, 1978e: 1), and emphasised the role of the school in induction and in-service training, providing a new wider approach in which 'teachers and schools also plan their own INSET programmes in the light of needs which they have identified' (DES, 1978e: 3).

The growing need for teacher appraisal is another feature that emerged from the mid-1970s when the post-war partnership was collapsing. Factors such as the Black Papers, the William Tyndale affair and the economic crisis of 1973-75 eroded the public image of teachers and brought about a growing call for the scrutiny of public education. Following Callaghan's Ruskin speech, the government's desire for control over the LEAs and teachers resulted in an emphasis on the accountability of education to new socio-economic needs. The government tried to secure this accountability through influencing the content of the school curriculum and strengthening the assessment of both pupils' and schools' performance. The 1977 Green Paper states that 'growing recognition of the need for schools to demonstrate their accountability to the society which they serve requires a coherent and soundly based means of assessment for the educational system as a whole, for schools, and for individual pupils' (DES, 1977c: 16). This policy stream was partly based on a claim that 'teachers lacked adequate professional skills' (DES, 1977c: 2), and facilitated the introduction of teacher appraisal in the Thatcher government, although the Great Debate did not result in immediate moves towards teacher appraisal as part of conditions of service.

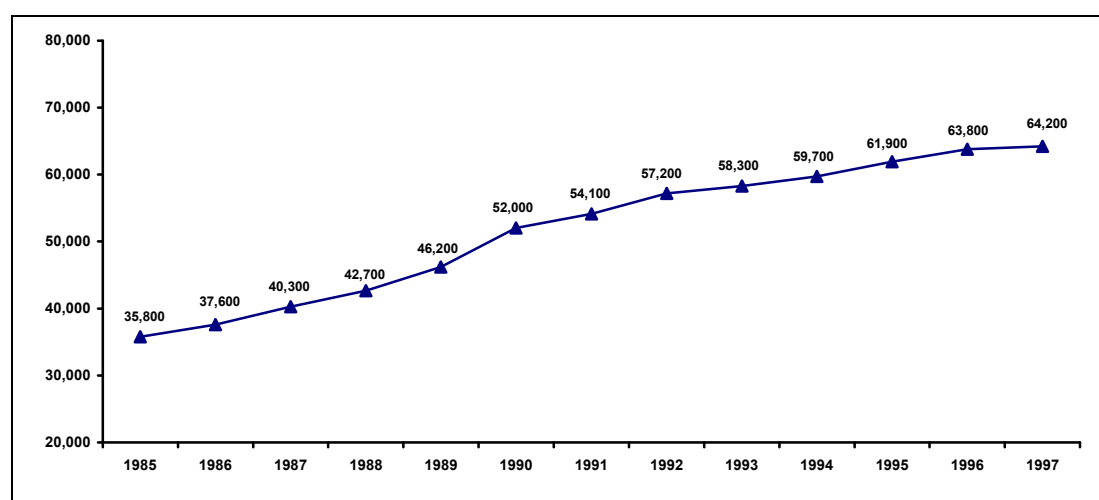
5.3.2. Policies on teacher employment and qualification

Teacher employment

The sharp cut in the number of teacher training places since 1972, in response to a belated recognition of the end of the post-war baby boom, contributed to the teacher shortages emerging from the early 1980s, and the government tried to influence teacher supply systematically by developing a more sophisticated means of modelling teacher supply and demand (DES, 1990a). Between 1983 and 1997, the training targets for both the primary and secondary phases were substantially increased – the primary target was progressively increased from 6,904 in 1983 to 15,750 in 1993, which reduced to just over 12,000; the secondary target was increased from 8,750 in 1983 to 11,346 in 1992 and to over 20,000 in 1997, but this figure was not met except during the years of economic recession from 1991-1993 (Smithers and Robinson, 2000: 4-5).

Throughout the Thatcherite governments' years, there was a continual fall in the number of full-time teachers in maintained schools (see Appendix 5.11). In 1980 there were 444,898 full-time teachers employed in the schools, but this fell to 370,280 by 1996. The falling numbers of teachers from 1994 partly reflect the influence of the exclusion of sixth-form colleges from secondary schools in statistics, by reclassifying them as part of the further education sector from 1 April 1993. In particular, the continual fall in the number of births from the mid-1960s to the late 1970s resulted in the falling pupil population which, together with cost constraints under the Thatcherite governments, directly influenced the numbers of teachers serving in schools during the period. In contrast, as Figure 5-4 below demonstrates, the number of part-time qualified teachers in maintained schools continuously increased from 35,800 in 1985 to 64,200 in 1997. It was recommended by the government that 'authorities should consider the appointment of more part-time teachers to provide specialist teaching in subjects for which the demand within a single school does not justify a full-time appointment' (DES, 1983b: 25).

Figure 5.4. Part-time qualified teachers in maintained schools, 1985-1997



Source: DfEE (1999c: 39)

The 1988 Act enabled all LEA schools, with the exception of special and nursery schools, to apply for GM status, with the first schools being given it from autumn 1989; thus, a small number of teachers in maintained schools emerged from 1990 onwards in the statistics. It is worth noting that teaching became a more graduate-inclined profession – the proportion of graduates among teachers was raised substantially from 34.6 per cent in 1980 to 56.9 per cent 1994. This rise largely reflects the influence of the policy whereby, as noted in Chapter 3, graduate-only entry into the teaching profession was made compulsory from 1980 by phasing out the existing certificate courses. The proportion of women teachers increased to 65.7 per cent in 1996 from 59.2 per cent in 1980.

Teacher qualification

As discussed in Chapter 3, the new criteria for initial teacher training courses were introduced in 1983 (DES, 1983) and embodied in the subsequent circular (DES, 1984a). Additionally, the BEd and PGCE courses became, from 1980, the main routes leading to QTS, and were complemented from the late 1980s by new programmes such as ATS, LTS, and SCITT. As in the past, under the Thatcherite governments, QTS was required for anyone intending to teach in maintained schools. Under the terms of Schedule 5 of the Education (Teachers) Regulations 1982, persons who possessed qualifications approved individually by the Secretary of State, with the consideration of their LEA's recommendation, became qualified teachers (DES, 1983b: 21). There were also certain categories of unqualified teacher which could be

appointed to maintained primary and secondary schools – unqualified teachers, that is, student teachers and instructors, which had been introduced by the Schools (Amendment) Regulations 1968, were still in effect; and in 1989 there emerged a new category of licensed teachers who could be employed under the terms of Schedule 4 to the Education (Teachers) Regulations 1989. Those who were previously employed as licensed teachers could be later recognised as qualified teachers by the Secretary of State.

5.3.3. Policies on teacher pay and working conditions

The teachers' dispute of 1984-1986 and the abolition of the Burnham system

Although the Burnham system was weakened by the two special adjustments, it still continued functioning as a national negotiating body on teachers' pay during the first term of the Thatcher government. However, teachers' salaries continually declined in relative terms during the first two terms of the Thatcher government, which was in parallel with the government's financial constraints. The NUT calculated that, by 1983, teachers' salaries had fallen behind by some 30 per cent, and many teachers felt themselves trapped on the tops of the scales – one-quarter on the top of the bottom two scales (Pietrasik, 1987: 171). In addition, the LEAs, as employers, were pressing for changes in conditions of employment and the salaries structure. The 1983 Burnham settlement (DES, 1983f) led to an increase of 4.98 per cent, but this was considered a poor increase that would mean the erosion of the relative salary levels of teachers. The teachers' dispute over pay began in March 1984, following the unions' claim for substantial salary increases for all teachers for a 1984 settlement against a government pay target of 3 per cent, and ceased following the so-called Coventry Agreement reached in July 1986 through the ACAS³⁴ talks.

During and shortly after this dispute, there took place a number of changes related to working conditions for schoolteachers, which were officially instituted by the Teachers' Pay and Conditions Act 1987. Among these changes, a major change was the abolition of the Burnham system. Kenneth Baker, who replaced Keith Joseph in

³⁴ Advisory Conciliation and Arbitration Service.

May 1986, did not fully accept the Coventry Agreement. He wanted stronger differentials in the new salaries structure and instead announced forthcoming legislation, which eventually led to the Teachers' Pay and Conditions Act 1987. Repealing the Remuneration of Teachers Act 1965, the 1987 Act put an official end to the discredited Burnham system, which had existed from its inception in 1919 as a national negotiating body operating on the basis of collective bargaining for schoolteachers. In addition, this Act gave new powers to the Secretary to issue regulations to determine pay and conditions of service. Now, the Secretary was empowered to make such provision 'as he thinks fit' (Section 3(1)) through statutory instruments. Teachers would be paid according to the terms of the order, and other prescribed conditions were to take effect as terms of their contracts (Fredman and Morris, 1987a: 108). Obviously, this growing central control over teacher pay and conditions of employment reflects government strategies focusing on reducing the powers of Labour-dominated local authorities and trades unions.

Teachers' pay and conditions: management and control over teachers' work

Initially, the 1987 Act was introduced in the wake of two years of dispute as a crisis measure, and it was thought that collective bargaining would be restored by reviewing the arrangements of the Act by 1990. The 1987 Act established an Interim Advisory Committee (IAC), but the power of the Committee was just advisory and the Secretary of State could direct it on the matters to which it should have regard. In January 1987, both parties of teacher unions and employers, at a CLEA/ST meeting, endorsed an agreement on the establishment of a national negotiating body for teachers' salaries and other conditions of service (Saran, 1988: 21). Instead of a negotiating body, however, the School Teachers' Pay and Conditions Act 1991 established a new review body in the form of the School Teachers' Review Body (STRB), which bore a closer resemblance to the previous IAC than to the four existing review bodies (Fredman and Morris, 1992: 44). Consequently, the powers of the Secretary conferred by the 1987 Act were continued without diminution under the 1991 Act. Under the 1987/91 Acts, the Thatcherite governments intervened actively in the management of the teaching profession, which shows one of the striking trends in the teaching profession under the New Right policies (see Appendix 5.12).

Now, under the 1987/1991 Acts, teachers' pay and conditions of service for teachers in local authority-maintained schools came to be determined according to three major sources. First, the School Teachers' Pay and Conditions Document, often referred to as the Blue Book, was prepared annually by the Secretary, and had effect in accordance with the Order made by the government allowing for recommendations from the STRB. Second, the Conditions of Service for School Teachers in England and Wales, the so-called Burgundy Book, was a national agreement between LEAs and the teachers' organisations, which covered many areas of conditions of service including sick pay, maternity pay, other leave, and grievance and disciplinary procedures. Lastly, local agreements could exist either on issues not covered in the two kinds of documents mentioned above, such as non-contact time, or on issues such as cover, sick leave or maternity pay where the local agreement improved upon the national agreement.

Under the 1987 Act, the first Education (School Teachers' Pay and Conditions of Employment) Order came into effect on 30 April 1987. A symbolic step towards a new management regime in schools was taken by introducing working time (or directed time) of 195 days (1265 hours) in any year, of which 190 days were to be teaching days in addition to carrying out other duties (Schedule 3). In addition, teachers' work to be performed in schools was also set out in detail under the heading of 'professional duties', covering from teaching and educational methods to management and administration (DES, 1987f: 23-25). This growing control over teachers' work in schools reflects the government strategies. The new regime in schools, instituted by the 1988 Act, focused on the management of the educational service and workforce as well. This managerial policy stream paralleled new management approaches in the private sector at this time such as TQM and HRM (human resource management). In addition to working time, Circular 7/90 (DES, 1990b) on the management of the school day provided guidance on the minimum weekly taught hours for pupils of primary and secondary age. This changing situation of teachers' status and their work under the New Right policies has been described by various scholars using terms such as 'proletarianisation' (Ozga and Lawn, 1988), Bricolage (Hatton, 1988), and 'deskilling and deprofessionalisation' (Ozga, 1995).

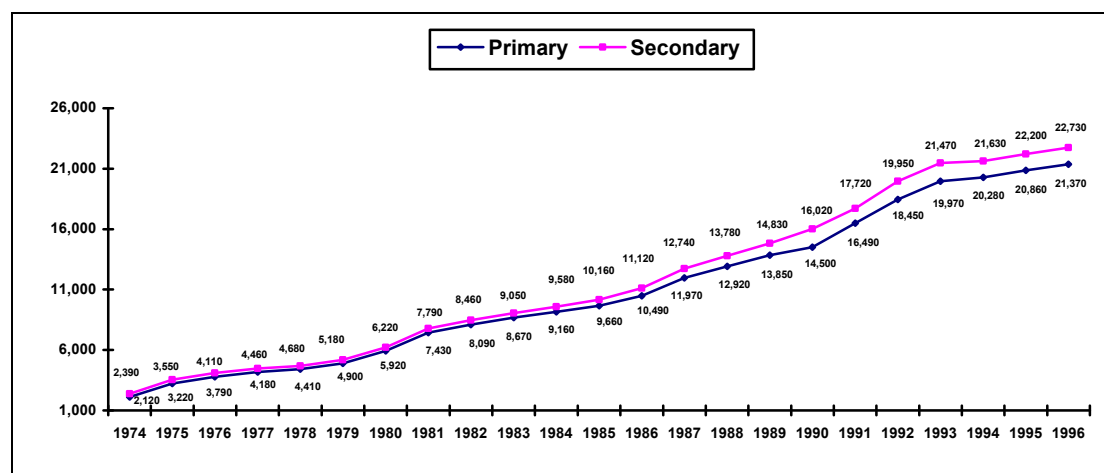
Changes in the salary structure

Among the settlements between 1987 and 1997 (see Appendix 5.13), major changes in the salary structure were made by the settlements of 1987, 1990, 1991, 1993 and 1996. The 1987 settlement (DES, 1987f) replaced the five salary scales with the new single main scale for classroom teachers, with five levels of incentive allowance. Under the settlement, heads and deputies, as with the previous settlements, continued to be paid on separate scales based on fourteen school groups. There were also additional allowances such as London Area allowances, temporary or acting allowances, allowances for teachers of blind and deaf children and for teachers employed in social priority schools, NQTs were paid as a lump sum, and there was also a scale for unqualified teachers. From the 1990 settlement, the main trend of changes lay in the integrating of scales and the increasing of scale points – the 1993 settlement (DfE, 1993b) integrated the incentive allowance with five levels into a new pay spine for classroom teachers with 18 scale points, increased from 10 under the 1991 settlement, and the 1996 settlement (DfEE, 1996e) increased these 18 scale points in effect to 35 scale points by introducing half points. The 1990 settlement (DES, 1990c) integrated separate scales for headteachers and deputy headteachers into a single scale with 49 points and the 1991 settlement (DES, 1991c) increased these 49 points to 51 points.

This trend of changes in the salary structure reflects the government's objective to 'replace a pay system determined by national collective bargaining by individual pay determined at school level on the basis of appraisal of performance' (Hatcher, 1994: 50). The 1987 Act marked the government's attempt to impose differential rates on an entire workforce by statute through enabling the Secretary of State to make different provision for different cases, including for different geographical and subject areas (Section 3(4)). The 1991 Act succeeded this section (Section 5(4)) and made special provisions for the exemption of the governing body of grant-maintained schools from the national arrangements (Section 3). Furthermore, the STRB, since its inception by the 1991 Act, 'confirmed the recognition of managerial responsibility by financial reward and strengthened headteacher and governor autonomy' (Ozga, 1995: 31). In this context, the integration of scales can be understood as helping an efficient control of the 'relevant body' (which may be the governing body or the LEA) over the management of the school, and the increase of scale points as providing flexibility in

linking pay with teachers' performance. The average annual salaries of teachers from 1974 to 1997 are shown in Figure 5.5.

Figure 5.5. Average annual salaries of full-time qualified teachers, 1974-1996 (£s)



Source: DCSF (2008m)

5.3.4. Policies on teacher appraisal

Policies in the 1980s: Education (No. 2) Act 1986

The introduction of teacher appraisals in the 1980s was in line with the government's growing control over the work of teachers and conditions of service. The early origins of teacher appraisal started in the form of the self-critical mood which developed in education from the mid-1970s. A number of schools and LEAs introduced self-assessment processes for schools, and by 1983 self-assessment was operating in at least fifty-six LEAs (Walsh, 1987: 154). In 1983, the government started to raise the need for 'formal assessment of teachers' performance' based on classroom visiting (DES, 1983b: 27). Furthermore, it felt that, for teachers showing unsatisfactory performance, 'employers must, in the interests of pupils, be ready to use procedures for dismissal' (DES, 1983b: 25). The government refined its thinking over the following two years and made clear its position. In the 1985 White Paper, replacing assessment with appraisal, it saw performance appraisal, instead of professional development, as an appropriate way to bring about a better relationship between pay, responsibilities and performance (DES, 1985a: 56). It also raised the need for a single national framework for the appraisal of teacher performance in the form of statutory

regulations and proposed that the Secretary should be empowered to 'require LEAs regularly to appraise the performance of their teachers' (DES, 1985a: 56).

As 1985 wore on, the debate on appraisal for promotion, dismissal and professional development developed among interested parties in education. Suffolk LEA, commissioned by the DES to run an appraisal pilot, produced a report (Suffolk, 1985) which 'favoured a professionally developmental approach to appraisal' (Bartlett, 2000: 26). HMI produced a publication (DES, 1985b) which 'clearly ruled out any direct link between appraisal and dismissal' (Evans and Tomlinson, 1989: 11). In November 1985, Keith Joseph facilitated the move towards the establishment of a national appraisal scheme for teachers through his speech at a national conference in Birmingham (Barber et al., 1995: 3). In June 1986, the ACAS Working Group on Appraisal and Training, involving representatives of the six teachers' organisations, the LEAs and the DES, produced a seminal report leaning towards the staff development model, seeing appraisal as 'a continuous and systematic process intended to help teachers with their professional development and career planning' (ACAS, 1986: 27). In the meantime, the government was moving to make teacher appraisal mandatory, and the Education (No. 2) Act 1986 received royal assent on 7 November 1986. Section 49 of this Act laid down provisions for appraising the performance of teachers:

The Secretary of State may by regulations make provision for requiring LEAs or such other persons as may be prescribed, to secure that the performance of teachers to whom the regulations apply... is regularly appraised in accordance with such requirements as may be prescribed.

The Act was criticised for having many loopholes, largely due to its open-ended nature (Sallis, 1988; Poster and Poster, 1993), but this should be understood in the context of government strategies. As discussed, the government ended the teachers' dispute of 1984-86 by removing teachers' bargaining rights on salaries and imposing a new contract and conditions of service. This 1986 Act was also a part of the continual shift of power from LEAs and teachers' associations to the Secretary of State and school governors, with the aim of making schools more responsive to market forces. In late 1986, the government funded, according to the suggestions of

the 1986 ACAS Report, the School Teacher Appraisal Pilot Study. This pilot study was carried out in six LEAs, under the auspices of the National Steering Group (NSG) comprising representatives of the LEAs, the teachers' organisations and the DES, and continued until well into 1989 when the NSG finally reported on the study.

The implementation of teacher appraisal on a national scale

In 1989, the NSG published its final report (DES, 1989e), concluding that the experience of the pilots provided 'a sound basis for the development of appraisal throughout England and Wales' and recommending 'a national framework for teacher and head teacher appraisal', which would be the basis of the development of a national statutory scheme (DES, 1989e: 2). As with the 1986 ACAS Report, the NSG Report also favoured a professional development approach. It reiterated the view of the ACAS Report on appraisal and went further with a statement that 'appraisal should be used positively to promote equal opportunities by encouraging all teachers to fulfil their potential as teachers' (DES, 1989e: 4). As Poster (1991: 18) puts it, the merit of these statements is that 'there is a clear rejection of appraisal as a device for managerial control, and an emphasis on appraisal as a strategy for professional development'.

The NSG Report was submitted to John McGregor in the summer of 1989 and was circulated for consultation in October to all Chief Education Officers, together with a HMI survey (DES, 1989f) showing developments in appraisal in the six pilot schemes and in other LEAs. While the NSG's proposals were generally welcomed in the education world, McGregor was not enthusiastic about introducing a statutory national appraisal scheme (DES, 1989g). In September 1990, he announced the establishment of a national scheme to be run on the basis of voluntary participation (McGregor, 1990). There was a cynical suspicion regarding his decision because 'as an ex-Treasury Minister, he had balked at the cost' (Goddard and Emerson, 1992: 8) – the NSG Report calculated that the cost of running a national appraisal scheme in the ongoing phase would be between £36.4m and £40.5 per annum (DES, 1989e: 23).

A policy change took place shortly after Kenneth Clarke came into office. In December 1990, he announced his intention to press ahead with appraisal, making available less than a third of the monies calculated by the NSG. Shortly after his

announcement, the draft regulations and circular for a national appraisal scheme were put on the consultation process. Finally, the Education (School Teacher Appraisal) Regulations 1991 came into force on 14 August 1991. The DES supported these Regulations by issuing Circular 12/91 (DES, 1991d). These two documents (see Appendix 5.14) are significant in that they introduced the National Scheme of School Teacher Appraisal and acted as the backbone of the national appraisal process, which went without amendment during the Major government.

The national appraisal scheme established by these two documents can be seen as a compromise between two different appraisal models – the staff development model and the accountability model (Goddard and Emerson, 1992: 10-19). Despite its strong preference for the accountability model, the government had to make somewhat contradictory statements in consideration of teachers' resistance. The stated aims of the appraisal scheme in the 1991 Regulations were to assist not only 'school teachers in their professional development and career planning', but also 'those responsible for taking decisions about the management of school teachers' (Regulation 4(1)). On the one hand, it was laid down that appraisal procedures should 'not form part of any disciplinary or dismissal procedures' (Regulation 4(4)) and there should be 'no direct or automatic link between appraisal and promotion or additions to salary' (DES, 1991d: para. 70). On the other hand, it was also laid down that 'it is legitimate and desirable for head teachers to take into account information from appraisals, along with other relevant information, in advising governors on decisions on promotions and pay' (DES, 1991d: para. 70).

The national appraisal scheme commenced in September 1991, stipulating that 'all school teachers for whom [they were] responsible on 1 September 1991 must complete the first year of the appraisal cycle during the school year 1994/95' (DES, 1991d: para. 15). Funding support for this scheme changed over time. During the period from 1991 to the spring of 1995, the scheme was supported by specific funding from grants for education support and training (GEST). For 1995-96, grant aid was confined to support for training for the management of appraisals, and thereafter grant support lay within the general allocations made to schools (Ofsted, 1996b: 8).

5.3.5. Privatised and school-focused in-service training

New INSET under Circular 6/86

By the early 1980s, a broad range of types of in-service experiences such as on-the-job school-based professional development activities, twilight sessions, teacher placements in industry, advisory teachers, and teacher centres developed, but long-term award-bearing courses at an HE institution on a full-time (seconded), part-time or evening attendance basis were the major form of professional development provision under the complex funding mechanism (Harland et al., 1993: 4-5). Of particular prevalence was the uncapped in-service pool encouraged LEAs to release their teachers to take these long-term HE courses. The pool was made up of a contribution from the DES and each LEA, and the release costs of the teacher were met from the pool – without any ceilings – in favour of those LEAs who had a large number of secondments (Goddard, 1989: 17). These long-term HE courses, together with HMI courses, helped the extended course-type provision remain the predominant development programme at this time.

Facing increasing spending through the uncapped in-service pool, the government began to exert control over the expenditure on in-service training. In 1983, the government announced its intention to introduce a limited scheme of central government grants for certain national priority areas of in-service training (DES, 1983b: 26). Following the announcement, the scheme was embodied by subsequent circulars (DES, 1983d; 1984c) whereby secondment funded through the pool was restricted to the priority areas designated by the government. The Education (Grants and Awards) Act 1984 made available ESGs for specific curriculum and professional development initiatives, and Circular 6/84 (DES, 1984e) embodied the ESG scheme with specified priority areas. Meanwhile, the new ACSET replaced the ACSTT by 1984 and produced a report (DES, 1984d) whereby it recommended, under the recognition of a deficiency in resources for in-service training, a target of LEAs' budgets for INSET equivalent to about five per cent of their expenditure on teachers' salaries.

In March 1985, the government made public its intention to introduce a new funding mechanism for the more systematic and purposeful planning of in-service training.

The government saw the existing pooling system as having serious defects since the system ‘favour[ed] relatively long courses, notwithstanding that shorter, less traditional activities may be more effective for many purposes’ and reduced LEAs’ incentives to seek good value for money (DES, 1985a: 53). It proposed fundamental changes to the funding arrangements for INSET by replacing the pool system with the principle of categorical funding, split into two parts: one part for the in-service training grants for national priority areas and the other for the general in-service grants for locally assessed priorities (DES, 1985a: 54).

On 29 August 1986, Circular 6/86 (DES, 1986) embodied this new specific grant scheme, christening GRIST³⁵ in the first year of operation, 1987-88 and later LEATGS³⁶ from 1989 to 1991. One of the purposes of this scheme stated in the Circular was ‘to encourage training in selected areas, which are to be accorded national priority’ (DES, 1986: para. 4). Under GRIST, the category of grants related to DES-determined national priorities were supported at a 70 per cent rate, and the other category of grants related to locally assessed priorities were supported at the rate of 50 per cent (Williams, 1991: 22). During the period of 1985-1987, the TRIST scheme was run by the MSC and did much to prepare the way for the implementation of GRIST, following the 1982 Further Education Unit’s model of curriculum-led staff development (Gaunt, 1997: 3-4). The new funding structure, established by the three special annual grant schemes, that is, ESGs, TRIST and GRIST, became known as ‘the new INSET’ (Harland et al., 1993: 6).

The new INSET had a wide-ranging impact on the structure of in-service training provision, which can be understood in the broader context of government strategies. First of all, with the new INSET, central government came to have the power to control in-service training needs directly through national priorities and funding allocations on a yearly basis. Secondly, under this new INSET regime, more market elements were introduced in the process of funding allocation. Following its previous experience through TVEI, the government actively applied the competitive bidding system to the new INSET – the TRIST scheme required LEAs together with schools to contract through bids against specific criteria for MSC funds, and LEAs also had to

³⁵ Grant-Related In-Service Training.

³⁶ Local Education Authority Training Grants Scheme.

bid each year for competitive GRIST funding through submitting their proposals to the DES. Lastly, the new INSET regime made in-service training provision more school-based. The ESG scheme increased the recruitment of advisory teachers in schools, and TRIST required schools to appoint INSET or staff development coordinators. These advisory teachers and coordinators provided school-based and classroom-based forms of professional development rather than courses provided by HEIs, so much so that the role of higher education in in-service training became somewhat marginalised (Day, 1989) and long-term secondments were gradually curtailed (Baker, 1986).

GEST: privatised and school-based INSET

Reforms emanating from the 1988 Act such as the National Curriculum, LMS and GM schools raised a growing need for the government to change the existing structure of funding for in-service training into one which would be more consistent with its overall strategy. In 1990, the DES closely scrutinised existing ESGs and LEATGS, which was duly followed by a report (Glickman and Dale, 1990). The report pointed out the complementarity of the two schemes and recommended the combination of them into a unitary grants system. Following the recommendations, the new unitary grants system began to operate in 1991 under the title of GEST.

As with the new INSET, GEST brought a significant change in the structure of in-service provision, which can also be understood in the context of government strategies. First of all, the government centralised INSET funding by favouring national priority areas announced in an annual circular, which led to the local priority element that had been retained by LEAs under the new INSET being phased out. Under the new GEST regime, LEAs retained control of the funds for designated courses, which were introduced from the mid-1980s in a twenty-day duration format. However, the DES exerted considerable control over these courses by specifying the foci and content to be addressed by institutions seeking approval to deliver these courses (Harland and Kinder, 1992), and many of these courses were reduced later to ten or five days (Gaunt, 1997: 5).

Second, under the GEST regime, a large portion of the funding was devolved to schools. This budgetary devolution in INSET funding, together with other reforms at

this time, enabled a more privatised INSET to appear. As discussed, the government, under the 1988 Act, attempted to introduce an education market into schools and took a further step towards the privatisation of education with a White Paper (DfE, 1992c). In line with this privatisation strategy, an element of privatisation was introduced in the provision of in-service training. Now, with delegated in-service budgets, the responsibility for the day-to-day management of INSET rested with schools and their designated professional development coordinators. Schools were able to choose appropriate agencies – including private ones – which could efficiently deliver the in-service provision they needed. LEAs became just one of a range of agencies and had to bid to ‘get the business’, struggling to transform their ‘command’ cultures into ‘service’ cultures or to shift from ‘management by control’ to ‘management by contract’ (Harland et al., 1993: 12).

Lastly, in-service training became more school-based. The in-service provision became, to some degree, school-based with the new INSET in the 1980s. Under the GEST regime, school-based INSET became prevalent, with the emphasis on school management and training. The School Management Task Force proposed ‘a new approach to school management development which focuses attention on the support which should be available in and near to the school’, placing ‘less emphasis on off-site training’ (DES, 1990d: 1), and the National Commission on Education (NCE) recommended that ‘all schools, as part of their school development plan, should have a policy for staff development with equal opportunities’ (NCE, 1993: 219). Under the new code of pay and conditions of service introduced in 1987, schools were encouraged to use the five non-contact days, first known as ‘Baker Days’, as professional development days for their staff (Morrison, 1993). In addition, schools became ITT providers with the introduction of school-based ITT (see Chapter 3). In line with their increasing role in ITT, schools were transformed throughout the 1990s into the main locus for the provision of continuing professional development (CPD) for their staff, which was facilitated by delegated in-service budgets to schools through GEST.

5.4. Policies in the New Labour Governments

5.4.1. IILs

Towards linking performance with pay

From the mid-1980s, new performance management systems began to be developed in the British public services, and were further developed in the first half of the 1990s with the introduction of PRP in the Inland Revenue, the Employment Service and the NHS (Marsden and French, 1998). In parallel with this policy stream, the Conservative government also attempted to introduce PRP in schools. Through the Parent's Charter of 1991, the Education (Schools) Act 1992 and four-yearly school inspections by Ofsted, the government established a national framework for securing schools' accountability for their performance. With the framework, the Major government tried to introduce PRP for schoolteachers through the STRB. The remit of the STRB included the work to examine and report on how the pay of schoolteachers might be 'more closely related to their performance' (STRB, 1992: 12), which was repeated during each of the years 1993-97 under the Major government.

In 1993, as elements of PRP, classroom teachers could be awarded by the relevant body up to three points for their 'excellent performance' with special regard to classroom teaching (DfE, 1993b: 10) (PRP pilot schools could be designated from 1993 (DfE, 1993b: 15)). However, the use of these 'excellence points' was limited in the first year of operation, largely due to the perceived financial constraints on schools and schools' reluctance to use them in the absence of suitable criteria (STRB, 1994a; 1996a; 1997). In 1991, elements of PRP for heads and deputies were introduced under the new pay spine with fifty-one points, and the government set out four criteria to which the relevant body may have regard in determining salaries for their heads and deputies (DES, 1991c: 7). In 1995, the STRB, under pressure from the government to establish a separate PRP scheme for heads and deputies, suggested four essential performance indicators (STRB, 1995: 19). Following this suggestion, the fourth criterion, much related to PRP in the 1991 Blue Book, was changed into a more rigid criterion (DfEE, 1996e: 13), and it was made compulsory for the relevant body to hold a review of the performance of the head and deputy in the light of these four

performance criteria before it determined any movement up the pay spine (DfEE, 1996e: 12).

Reviews of the national teacher appraisal scheme

The national teacher appraisal scheme commenced in 1991, and most teachers had completed a two-year cycle of appraisal by the summer of 1995. After its introduction and early rounds, the scheme was put under review to evaluate its impact. However, the judgements on its performance scheme were not consistent among reports. Barber et al. (1995: i), commissioned to carry out a research project by the DfE, drew positive conclusions. Wragg et al. (1996: 188), through an evaluation of appraisals over a two-year project involving over 1100 teachers, found that ‘over about 70 per cent of teachers said they had derived personal benefits from it’. However, negative judgements on the scheme came first from Ofsted. In April 1996, Ofsted produced a report based on its visits to schools and inspection reports. In the report, Ofsted made the following evaluations on the performance of teacher appraisal:

Overall, the impact of appraisal on teaching and learning has not been substantial. In only 20% of schools visited by HMI had appraisal led to observable improvements in teaching, and then on a minor scale for the most part. In a majority of schools, appraisal has remained too isolated from school development and INSET planning.

(Ofsted, 1996b: 10)

This report was followed by a Joint Review Report (TTA/Ofsted, 1996). The Review identified key weaknesses including lack of rigour, poor evaluation of the impact of appraisal on teaching quality and standards, inappropriate target-setting, failure to secure the role of the line manager as the appraiser, failure to link appraisals with school training and development plans, the two-year cycle, and low priority accorded to appraisals (TTA/Ofsted, 1996: 4). Moreover, it raised a need to change the nature of appraisals by outlining requisite key principles (TTA/Ofsted, 1996: 5). This joint review is significant in that it saw appraisal as becoming part of ‘an effective system for managing performance’ (Bartlett, 1998: 229), and that this perspective was maintained by the incoming New Labour government.

Growing concern for workforce management

With the 1988 Act and the new framework for schools from 1991, teachers became subject to rapidly increasing workloads relating to a wide range of activities that needed to be addressed in order to meet the centrally specified requirements. In particular, the implementation of SATs and the intensified inspection of schools by Ofsted led to an immense workload, with associated stress for teachers. Facing strong opposition to SATs from teachers threatening a boycott in 1993-94, the government began to pay attention to the question of teachers' workload through the Dearing Review (1993), which partly addressed the issues by reducing the statutory curriculum, introducing up to 20 per cent non-National Curriculum teaching time and simplifying test arrangements. The question of teachers' workload received further attention by the STRB. As we have seen, the STRB's remit included not only the matter of teachers' pay, but also the matter of teachers' conditions of service. Under the Major government, the STRB conducted two surveys on teachers' workloads, in 1994 and 1996 respectively, and the results of the surveys were made public in two reports (STRB, 1994b; 1996b).

During the 1990s, there was a considerable increase in the role of private supply agencies recruiting teachers. Both the agencies and supply teachers increased greatly in number after the first agency was set up in 1989, partly due to the fact that 'the supply pools run by LEAs had been relatively inefficient, while supply agencies offered a better service, getting well-trained teachers into schools promptly' (Ross and Hutchings, 2003: 64). The agencies and businesses providing supply teachers had been regulated only by the Employment Agencies Act 1973 and the Conduct of Employment Agencies and Employment Businesses Regulations 1976. In this situation, educational regulation for supply teachers was first introduced by Circular 7/96 (DfEE, 1996f), which gave guidance to schools on the checks that must be carried out when recruiting supply teachers and legal requirements relevant to the use of supply teachers. The circular was followed by Guidance Notes (DfEE, 1996g) for the agencies and LEAs. The government's growing concern for teachers' workloads and the employment of supply teachers paved the way for the workforce reform made by New Labour.

5.4.2. Changes in employment and qualification

The number of regular teachers employed in maintained schools increased from 399,200 in 1997 to 435,600 in 2006, and thereafter slightly decreased to 434,900 in 2008 (see Appendix 5.15). The government made a commitment in its 2001 manifesto to increase the number of teachers through recruiting 10,000 extra teachers during its second term, with a view to improving teacher-pupil ratios (Labour Party, 2001: 19). The number of part-time teachers among qualified regular teachers continually increased to 50,400 in 2008 from 30,000 in 1997. As in the Thatcherite governments, in order to teach in a maintained school, teachers were normally required to have QTS. The Blair government set out standards that must be achieved by trainees in order to be awarded QTS (see section 3.4). Furthermore, it was possible to work as an unqualified teacher in maintained schools if the prospective teacher fell into one of three main categories of teachers without QTS: trained teachers from countries outside the European Economic Area whose qualifications were recognised in the state schools sectors of those countries; instructors employed only where teachers with qualified status in a particular art or skill such as music and sport were not available; and teachers on employment-based teacher training (DfES, 2003e: 10).

Teachers in occasional service were occasional teachers who had a contract of less than one month and were employed for the whole day on the survey date. In terms of employment status, occasional teachers together with instructors and OTTs were closely related to so-called supply teachers, who were not contracted to the school, including both those teachers carrying out ad hoc work when the regular teacher was not available and those covering for a long period of time due to long-term absences or recruitment difficulties (Hutchings et al., 2006: 3). Circular 7/96 (DfEE, 1996f: para. 1) set out four main sources from which a school could recruit supply teachers: pools of potential supply teachers kept by an LEA; employment businesses and agencies; the school's own contacts; and part-time teachers working at the school or locally, who were temporarily willing to work extra hours. The employment status of supply teachers depended on individual contracts made on the basis of these four sources. The supply teachers recruited through the agencies concerned were judged in June 1995 by the court as not being employed by the LEA or school governing body, with the result that they should negotiate their pay and conditions of employment with

their agencies outside the framework of the School Teachers' Pay and Condition Act 1991 (DfEE, 1996g: 1). Under the Blair government, supply teachers were addressed as part of the school workforce reform, together with guidance (DfES, 2002c) and a research report (Hutchings et al., 2006).

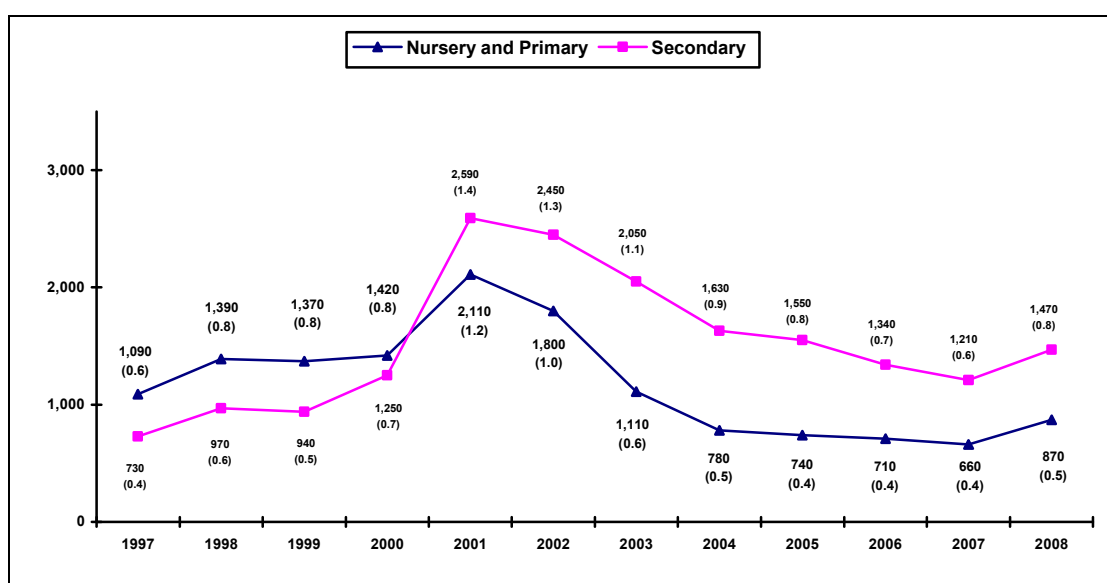
With regard to qualifications for teachers, one thing to note is that the Blair government made some changes in requirements for teachers' employment under its raising standards strategy. Currently, there are four main requirements necessary to qualify for normal employment as a teacher in maintained schools in England: the acquisition of QTS by achieving the standards for an NQT set out by the government; registration with the GTCE; clearance in checks against criminal records; and the passing of QTS skills tests in addition to a teaching degree or postgraduate certificate (Ross and Hutchings, 2003: 46). Currently, QTS is awarded by the GTCE under the Education (School Teachers' Qualifications) (England) Regulations 2003.

QTS skills tests cover the core skills in numeracy, literacy and ICT. The skills tests in numeracy and literacy were introduced in May 2001, and since 1 May 2002 passing all the three skills tests has been a compulsory requirement for all trainees in England to meet before they can be recommended for the award of QTS by their ITT provider. These tests are computerised and can be taken at any of approximately fifty test centres in England. The pass mark is 60 per cent in each test, and failure in any one means the candidate cannot attain QTS; however, the test can be retaken throughout their training year until a pass is achieved. Trainees who have completed their ITT but not passed all the skills tests were allowed, under the Education (Specified Work and Registration) (England) Regulation 2003, to teach for up to five years, but the Education (Specified Work and Registration) (England) (Amendment) Regulations 2007 replaced this five-year grace period with a fixed deadline of 31 August 2008, so that, from 1 September 2008, trainees who completed their ITT but not passed the skills tests could not be employed as teachers in the maintained sector (TDA, 2008a).

The introduction of these skills tests is in line with NLNS (see section 4.4). That is, under the raising standards strategy, the government attempted to raise pupils' standards in literacy and numeracy by raising teachers' standards in these areas by the introduction of the skills tests. Figure 5.6 below shows the vacancy numbers and rates

of full-time teachers during the years 1997-2008. To boost teacher recruitment, the government announced in October 1998 a £130 million package of measures including new financial incentives for the trainees, intended to teach the key shortage subjects of maths and science (DfEE, 1998a: 72). However, the British economy experienced relatively low unemployment and stability in inflation (see section 2.4.2), which militated against teacher recruitment. Ofsted (2003d) identified there were still difficulties in the recruitment of teachers in maths, science, modern foreign languages, design and technology and ICT.

Figure 5.6. Full-time teacher vacancies (rates) in maintained schools, 1997-2008



Source: DCSF (2007b: table 6; 2008n: table 6)

5.4.3. School workforce reform

Towards a National Agreement

From its very beginnings, New Labour recognised, under its raising standards strategy, the growing need to change school working practices for improving teachers' working conditions. In its first White Paper, the government put an emphasis on giving teachers time to focus on 'the important task of raising standards' by rooting out unnecessary bureaucracy and using non-teaching staff (DfEE, 1997a: 50). Through the 1998 Green Paper, it made comprehensive proposals for improving teachers' working conditions, under the perspectives that 'teaching and learning can be

strengthened by using the full potential of teaching assistants and school support staff' and 'teachers should have working conditions comparable to other professions' (DfEE, 1998a: 55).

In 2000, however, the STRB (2000) provided the consistent evidence that teachers were still experiencing long hours and intensified work in school, which had been found already through its previous surveys (STRB, 1994b; 1996b). The issue of teacher work and workload was addressed more actively during Blair's second term of office. The government pointed out three major issues unresolved during its first term, one of which was teachers' workload and long working hours (DfES, 2001a: 55). Moreover, the government announced its intention to 'examine the potential for providing more time for planning, preparation and management' in the direction of 'reducing workload and increasing flexibility' (DfES, 2001a: 56). In May 2001, it commissioned PricewaterhouseCoopers (PwC) to 'undertake a review to identify the main factors that determine teachers' and head teachers' workload... in order to raise standards of pupil achievement' (PwC, 2001: 1). PwC's final report (PwC, 2001) suggested that teachers and headteachers were working more intensive weeks than other comparable managers and professionals, and that many of their tasks were administrative and clerical, distracting them from their core purpose.

In the meantime, Estelle Morris set in November 2001 the pace for the national agreement on the workforce reform through the publication of a pamphlet (DfES, 2001b). In the spring of 2002, the DfES launched the Transforming the School Workforce Pathfinder Project as a pilot project, aiming to secure significant reductions in the hours worked and to increase the proportion of teachers' time spent on teaching (Thomas et al., 2004: ii). In October 2002, the government embodied its proposals for the reform of the school workforce in a document (DfES, 2002d), which sought to advance school workforce reform as part of a public services reform and set out a seven-point plan for 'creating time for teachers and headteachers' (DfES, 2002d: 6-7). The proposals in the 2002 document were duly followed by negotiations, and a National Agreement between the government, employers and school workforce unions was finally reached in January 2003 with the creation of a working document (ATL et al., 2003).

Remodelling the school workforce

Policies on the National Agreement were in line with government strategies. First of all, the government applied its new partnership strategy to the shaping and implementing process of the Agreement – eleven signatories, representing government, employers, school workforce unions including teachers’ associations and general workers’ unions, signed the Agreement so that from the start the Agreement was intended to be implemented on the basis of partnership for securing joint action. Additionally, the government intended to remodel the school workforce and to use this Agreement as a means of raising standards as well as a means of addressing teacher workload (ATL et al., 2003: 1). This Agreement, together with subsequent reforms based on it, was known as ‘remodelling the school workforce’ (Gunter and Rayner, 2007: 48). As Figure 5.7 shows, the Agreement set out three phases of change to be introduced in all maintained schools over three years, with every reform in each phase almost completely related to contractual changes to teachers’ conditions of service.

Figure 5.7 Three phases of change in schools by the National Agreement

Phase One - 2003 <ul style="list-style-type: none">● Establish monitoring group● Establish new Implementation Review Unit● Routine delegation of 24 non-teaching tasks● Promote reductions in overall excessive hours● Introduce new work/life balance clauses● Introduce leadership and management time● Undertake review of use of school closure days
Phase Two - 2004 <ul style="list-style-type: none">● Introduce new limits on covering for absent teachers
Phase Three - 2005 <ul style="list-style-type: none">● Introduce guaranteed professional time for planning, preparation and assessment● Introduce dedicated headship time● Introduce new invigilation arrangements

Source: ATL et al. (2003: 16)

To help implement these reforms, organisations such as NRT, WAMG (Workforce Agreement Monitoring Group) and IRU (Implementation Review Unit) were formed under the new partnership strategy. As an example of a public-private partnership, the NRT, located in the NCSL, consisted of a mix of change management consultants

made up of educationalists and those from the private sector (Easton et al., 2005: 1). This body rolled out the remodelling programme in October 2003, presenting schools with a five-stage ‘change management process’ model (Wilson et al., 2005: 2-3). Before being transferred to the TDA, the NRT operated for three years, and its work was evaluated each year by the NFER (Wilson et al., 2005; Easton et al., 2005; 2006). The Agreement enabled schools to manage cover through various options. In particular, the following statements concerning high level teaching assistants (HLTAs) caused much controversy among the teaching profession:

High level teaching assistants will be able to cover classes, and should be able to ensure that pupils can progress with their learning, based on their knowledge of the learning outcomes planned by the classroom/subject teacher.

(ATL et al., 2003: 7)

Teachers were concerned that ‘their job would be devalued if untrained staff were allowed to teach whole classes’, which was a key reason why the NUT refused to sign the Agreement (Burgess, 2008: 6). The Education (Specified Work and Registration) (England) Regulations 2003 and their accompanying guidance (DfES, 2003f) enabled support staff such as HLTAs to undertake ‘specified work’ in schools under the supervision of a qualified or nominated teacher. Under the 2003 Regulations, HLTAs were expected to account for the majority of support staff undertaking the specified work, which remained unchanged under the Education (Specified Work and Registration) (England) (Amendment) Regulations 2007 and their accompanying guidance (DCSF, 2007b). It is worth noting that these Regulations and guidance were fully endorsed under the new partnership strategy by the signatories to the National Agreement (DfES, 2003f: 1; DCSF: 2007b: 1). With the school workforce reform, the portion of support staff in the overall school workforce increased from 25.0 per cent in 1997 to 42.5 per cent in 2008 (DCSF, 2007c; 2008n).

National occupational standards

With the growth of support staff, the government extended its raising standards strategy to school support staff by establishing professional standards for HLTAs (DfES/TTA, 2003b), which were very similar to those for QTS (DfES/TTA, 2002; 2003a) because these standards were designed to ‘support smooth progression to QTS

for those HLTAs with the potential and interest to go on to qualify as teachers' (DfES/TTA, 2003b: 4). In June 2007, these professional HLTA standards were followed by a revised version (TDA, 2007b). Furthermore, the government linked workforce reform with the children agenda by developing the integrated national occupational standards (NOS) and skills (knowledge) for the children's workforce (HMT, 2003; DfES, 2005h; 2005i). The NOS for teaching/classroom assistants was initially developed in 2001 by the Local Government National Training Organisation (LGNT0, 2001). The TDA took responsibility for the NOS from the LGNT0 in 2005 and replaced it in 2007 with the new NOS for supporting teaching and learning in schools (STL NOS), which comprised sixty-nine units including core (or mandatory) units and a selection of optional units at both levels 2 and 3 (TDA, 2008b). The Common Core of Skills and Knowledge for the Children's Workforce (DfES, 2005i) is now incorporated into the new NOS, which covers a much broader range of roles and responsibilities in schools from teaching assistant to cleaner. The government announced its intention to bring more integration within the whole children's workforce context (DCSF, 2007d; 2008p).

5.4.4. Performance-related pay and performance management

Creation of a new pay system: PRP

Although some elements of PRP were introduced during the Major government, teachers' pay had not been directly related to their performance since the abolition of the payment by results system. However, this situation began to change with New Labour coming into power in 1997. In its first White Paper, as a means of raising standards the Blair government intended to introduce advanced skills teachers and improve the present teacher appraisal arrangements under the concept of 'performance management' (DfEE, 1997a: 48-49). Under its modernisation for raising standards strategy, the government took a further step towards introducing 'a modern pay system', making five proposals related to PRP: a performance threshold leading to a new upper pay range; annual appraisal arrangements to influence decisions on the pay of individual teachers at all levels; a school performance award scheme; performance management in schools; and clear accountability and monitoring of the

new system (DfEE, 1998a: 31). Two main pillars of this new pay system were the concept of the performance threshold and performance management (PM).

Between January and September in 1999, the proposals in the 1998 Green Paper were followed by subsequent documents (DfEE, 1999d; 1999e; 1999f; 1999g), whereby it was made clear that performance and pay reviews would be recognised as separate stages in the performance management process; applying for the threshold would be voluntary and threshold assessments would be paid for by additional funding; heads were to judge threshold assessments, with validation by external assessors who would have the final decision; and governing bodies were to use an external advisor in evaluating the performance and pay of heads. Most importantly, the government continued its emphasis on linking appraisal with pay determination: 'we propose a much closer link between pay and appraisal than has previously been the case' (DfEE, 1998a: 34) and 'a decision on pay and promotion would be informed by performance review' (DfEE, 1999e: para. 15). Following relevant training delivered by private education contractors, threshold assessment and performance management began to be implemented in the summer and autumn terms of 2000 respectively.

Changes in the pay structure under the PRP system

The introduction of the threshold and PM in 2000 led to major changes in the pay structure (see Appendix 5.16). A new pay scale with nine scale points was introduced for classroom teachers, and teachers at point 9 could apply to pass the performance threshold. To pass the threshold assessment, teachers were required to present evidence which met the standards grouped under five headings: knowledge and understanding; teaching and assessment; pupil progress; wider professional effectiveness; professional effectiveness (DfEE, 2000d). Teachers who passed the threshold received an annual bonus of £2001, payable until the end of their career, and they moved on to an upper pay scale for post-threshold teachers with 5 scale points, each of which were also related to performance. Currently, the threshold assessment application is in Round 9 for 2008/9. Another major change in the pay structure in 2000 was the introduction of a new pay spine for the leadership group, which consisted of head, deputy and assistant head. The assistant headteacher role was created as a new leadership post in 2000.

Under this new pay system, teachers' pay became linked to their performance. In particular, the standard of pupil progress required teachers applying for the threshold to present evidence which 'should be shown in marks or grades in any relevant national tests or examinations, or school-based assessment for pupils where national tests and examinations are not taken' (DfEE, 2000d: 4). This is a similar requirement under the payment by results system, and caused much concern among teachers. Under the current performance management system, 'performance review' applies to all teachers, and this is particularly important for those on the upper pay spine, those in the leadership group and those on the proposed 'fast track' since the results of their performance review directly influence employers' decisions on their pay. With the establishment of the PRP system, teachers' pay became strikingly individualised – new posts such as post-threshold teachers, advanced skills teachers, excellent teachers and assistant headteachers were created with different pay scales. Furthermore, classroom teachers were able to differentiate their pay by applying for the threshold and taking on responsibilities leading to various allowances, and different pay scales for teachers and heads in Inner London, Outer London and the fringe area were officially established.

Policies on PM

The development of the new PRP system should be understood in the context of the government's policy on PM. As noted, alongside the implementation of threshold assessment, the government first introduced PM into schools in September 2000. From the start, the government felt that the then present teacher appraisal arrangements, which had been introduced by the Major government, did not provide an adequate check on standards and performance in the profession. With this in mind, it decided to undertake an urgent review of the present arrangements, suggesting three key elements of teacher appraisal arrangements under the heading of 'performance management'. These elements were classroom observation, an assessment of the results achieved by pupils in a teacher's care and an annual performance review linked to targets for enhanced pupil performance (DfEE, 1997a: 49). In the 1998 Green Paper, the government proposed the introduction of PM in schools with a belief that the proposed new pay system depended on 'the success of appraisal as part of performance management' (DfEE, 1998a: 38). In addition, the introduction of PM in schools was in parallel with the government's drive toward transforming public

services under its modernisation strategy (CO, 1999).

Following the consultation process (DfEE, 1999d; 1999e; 1999f; 1999g), the government published a PM pack in April 2000 as guidance for schools. The existing 1991 Regulations and their amended 1999 Regulations for teacher appraisal were replaced in June 2000 with the new Education (School Teacher Appraisal) (England) Regulations 2000, effective from 1 September 2000. The government's PM policy was commenced on the basis of the 2000 Regulations and, one year later, the Regulations were replaced by the Education (School Teacher Appraisal) (England) Regulations 2001 to consolidate existing regulations for teacher appraisal and to extend PM arrangements to other teachers, including teachers in maintained nursery schools. The 2001 Regulations were replaced by the Education (School Teacher Performance Management) (England) Regulations 2006, effective from September 2007.

The revised arrangements for PM via the 2006 Regulations (see Appendix 5.17) reflect developments that followed the 2003 National Agreement, led by the Rewards and Incentives Group (RIG). The RIG was established in February 2004 to consider further reform necessary to 'enable schools to better use the pay and performance management systems' (RIG, 2004), and reflected the new partnership strategy in that it consisted of organisations representing government, employers and unions. One thing to note at this juncture is that the RIG furthered the 'new professionalism', which played a role since the 1998 Green Paper, as a core notion providing a basis of the government's modernisation strategy through developing more effective arrangements for PM. The RIG saw the 2003 National Agreement as having laid the foundations for new professionalism by 'removing from teachers tasks which do not require their professional skills and expertise; brining downward pressure on working hours; and building capacity to enable teachers to focus on their core role and enhance their professional status' (RIG, 2005: para. 9.1). The RIG regarded the development of effective arrangements for PM as part of the development of this new professionalism (RIG, 2006: 4). The experiences and views of heads and teachers to the PRP system were, however, not positive (Haynes et al., 2003; Mahony et al., 2004; Wragg et al., 2004); nevertheless, New Labour continued to maintain the system under its modernisation for raising standards strategy.

5.4.5. Continuing professional development

GTCE

Following the abolition of the Teachers' Registration Council and its register in 1949, there were some gestures toward the establishment of a professional council for teachers. In the 1950s, teacher organisations began to press the government to establish a General Teaching Council (GTC) (Tomlinson, 1995: 61). In the meantime, the GTC for Scotland was established in 1965, and the new Secretary of State, Edward Short, intended to set up a GTC for England and Wales, the framework of which was later detailed by the Weaver Report (DES, 1970c). However, government reluctance to surrender the control of teacher supply to teachers themselves and the economic recession following the 1973 oil crisis led to the failure of the establishment of a GTC in the 1970s. During the Thatcher and Major years, leaders such as Alec Ross, John Sayer and John Tomlinson led a campaign for a GTC for England (GTCE). They sought to secure cross-party parliamentary support and allay government fears of a possible mega trade union and 'producer' interests by providing that the GTCE should have an advisory rather than an executive role in key areas (Kirk, 2000: 235). In 1990, they created the GTC (England and Wales), known as the 'GTC in-waiting', in the form of a coalition of educational and other bodies, and effectively pressed the Labour Party to establish a GTC in legislation.

In its first White Paper, the Blair government confirmed its intention to legislate in order to establish a GTC which would 'become an effective body which truly reflects the teaching profession and all those with a stake in high professional standards' (DfEE, 1997a: 52). Following the consultation process (DfEE, 1997h; 1998e), the Teaching and Higher Education Act 1998 was duly enacted in July 1998 to establish statutory GTCs for England, Wales and Northern Ireland. According to the 1998 Act, the GTCE, which consisted of sixty-four members and was formally operated from September 2000, was aimed at 'contribute[ing] to improving the standards of teaching and the quality of learning' and 'maintain[ing] and improve[ing] standards of professional conduct amongst teachers' (Section 1(2)). It was empowered to maintain a register of qualified teachers in England, and regulate the teaching profession, advise the Secretary and other agencies on a wide range of issues on teachers and their profession (Sections 2-7). In June 2001, the GTCE took responsibility, including work

on the recognition of European qualifications, for awarding QTS on behalf of the Secretary (GTCE, 2002; 2003: 6).

Policies on CPD

Under the raising standards strategy, the Blair government saw high quality in-service training as ‘the key to raising standards through updating teachers’ skills and enabling them to keep pace with best practice’, placing a particular emphasis on training to underpin its drive on literacy, numeracy and IT (DfEE, 1997a: 48). It argued that ‘a clear and continuing commitment to professional development through a career should be at the heart of teachers’ professionalism’ and suggested a new training framework in which three distinct elements should be taken into account: national training priorities such as literacy, numeracy, ICT, headship training, special educational needs; school priorities emerging from school development planning; and the individual development needs of teachers identified through annual appraisals (DfEE, 1998a: 48). During its first term in office, the Blair government supported teachers’ professional development by filtering money, such as that used for the ‘standards fund’ and the general grants to schools, directly to schools, focusing on the training to help national initiatives such as NLNS, EiCs and EAZs, beacon and specialist schools, headship training programmes, and training in ICT skills.

At the end of its first term, the government recognised that the teachers’ own development needs and school priorities had not been taken into account (DfEE, 2001c: 6-7). As a consequence of this recognition, it produced in February 2000 a consultation document (DfEE, 2000c) envisaging a new framework for professional development. Meanwhile, the government published a Green Paper in February 2001 containing proposals for a further step towards modernising the teaching profession, including the proposal for enhancing professional development backed by a total of £92 million (DfEE, 2001a: 64). In March 2001, the government made public its strategy for professional development by issuing a document (DfEE, 2001c), which defined professional development as ‘any activity that increases the skills, knowledge or understanding of teachers, and their effectiveness in schools’. Further, the notion of continuing professional development (CPD) was employed under the recognition of the growing importance of lifelong learning (DfEE, 2001c: 3).

Accepting advice from the GTCE supporting a career-long and sustained guarantee of entitlement to professional development, the government set out in the document a wide range of proposals in six key areas including the extension of the professional bursaries scheme, the introduction of sabbaticals, individual learning accounts, and maintenance of the funding for award-bearing INSET courses (DfEE, 2001c: 6-23). From the introduction of PM and the school workforce reform, policies on CPD were implemented as an integrated part of these reforms. The government transferred responsibility for CPD to the TTA in September 2004 and designated the TDA its 'modernisation agency for the school workforce' (DfES, 2005b: 98). In this policy stream, CPD is currently understood to be part of an annual cycle which links it with PM, school self-evaluation, the school improvement plan, and standards for teachers (TDA, 2007c: 4).

Professional standards: from induction to headship

The 'probationary year' for a new teacher was first introduced and regulated by Administrative Memorandum 4/59 (MoE, 1959b), and an assessment of the new teacher's ability to teach was made during the period. Until the Thatcher years, the development of probation for NQTs was supported not by statute but by administrative memorandum (DES, 1983g). Critical views on the provision for NQTs were consistently provided by HMI reports (DES, 1982f; 1988d). In 1992, Kenneth Clarke announced the abolition of the probation year, replacing the regulations on probation by non-mandatory guidance (DES, 1992b). Under the guidance, the responsibility for induction was shifted from LEAs to schools, and there was neither any assessment of the first year of teaching nor a requirement for schools to provide induction.

This situation began to change with New Labour coming into power. The government announced its intention to introduce induction for NQTs under the idea of a 'supported induction year', aiming to 'consolidate their skills' learnt during ITT (DfEE, 1997a: 47-48). Statutory induction for NQTs was introduced by the Teaching and Higher Education Act 1998, arrangements for which were detailed by the Education (Induction Arrangements for School Teachers) (England) Regulations and Circular 5/99 (DfEE, 1999h). Under these arrangements, from May 1999, all NQTs employed in a maintained or non-maintained special school were required to complete

a statutory induction period of not less than three school terms. This statutory induction was introduced to provide each NQT with a bridge from ITT to a career in teaching, a foundation for long-term CPD, and well-targeted support leading to their contribution to school improvement and raising classroom standards (DfEE, 2000f: para. 1). As Totterdell et al. (2002: 10) put it, the two main principles of this policy were ‘NQTs’ national entitlement to support and professional development’ and ‘assessment of NQTs against defined national standards’. Under current statutory induction arrangements detailed by the Education (Induction Arrangements for School Teachers) (England) Regulations 2008 and the statutory guidance (DCSF, 2008q), the core standards, which form part of the framework of professional standards for teachers, apply to all NQTs.

Furthermore, the government initiated a drive toward strengthening school leadership. From the outset it saw heads as well as teachers as being at the heart of its push to raise standards, and announced its intention to introduce a mandatory headship qualification, expecting the National Professional Qualification for Headship (NPQH) launched by the TTA to form the basis of this new qualification (DfEE, 1997a: 45-46). In the 1998 Green Paper, the government raised the need to ‘develop strong leaders, reward them well and give them the freedom to manage’, and set out a wide range of proposals for the pay, career and professional development of heads (DfEE, 1998a: 21). One of these proposals was the introduction of a national framework for headship training at three levels (qualification, induction and extension), by building on the existing three programmes – NPQH, HEADLAMP³⁷, LPSH³⁸ – developed by the TTA (DfEE, 1998a: 27).

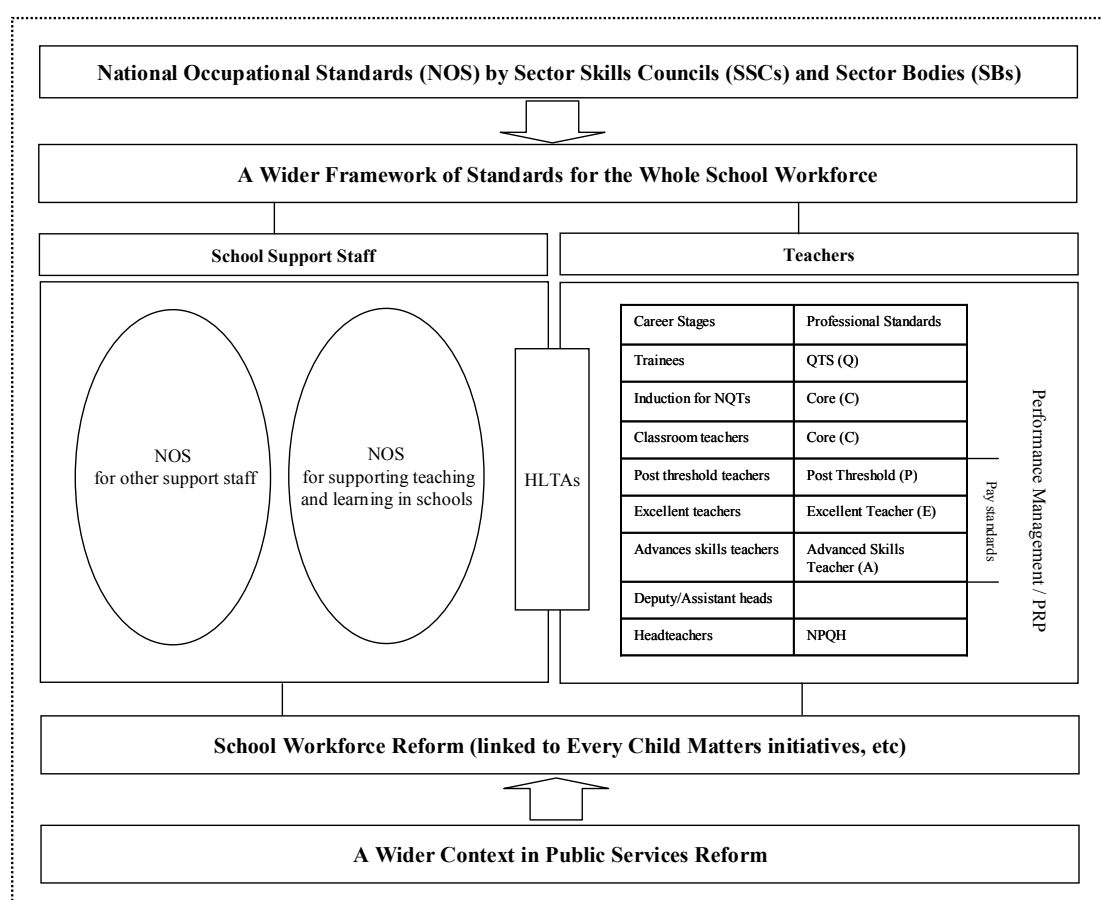
With the introduction of this national framework, the government commissioned the TTA to develop national standards for headteachers (TTA, 1997b), and set out its final version in September 2000 with a publication (DfEE, 2000g). Meanwhile, the NCSL was officially opened in November 2000 to provide a single national focus for school leadership training and development, taking over the responsibility for running the existing three programmes from the TTA. In partnership with the NCSL, the government proposed in March 2002 to introduce a mandatory requirement for first-

³⁷ Headteacher Leadership and Management Programme.

³⁸ Leadership Programme for Serving Heads.

time headteachers to hold the NPQH (DfES/NCSL, 2002), and in April 2004 the NPQH became mandatory for all first-time headteachers. The current NPQH is underpinned by the revised National Standards, which ‘recognise the key role that headteachers play in engaging in the development and delivery of government policy and in raising and maintaining levels of attainment in schools in order to meet the needs of every child’ (DfES, 2004a: 2).

Figure 5.8 Professional standards for teachers in a wider policy context



The current framework of professional standards for teachers (TDA, 2007d) provided by the TDA covers five career stages (Q, C, P, E, A), and is complemented by the introduction of the statutory induction and NPQH. Professional standards are statements of a teacher’s professional attributes, professional knowledge and understanding, and professional skills. As shown in Figure 5.8 above, this professional standards framework for teachers forms part of a wider framework of standards for the whole school workforce. Additionally, the introduction of coherent national occupational standards can be understood in the context of school workforce

reform, which has been being implemented as part of a wider public services reform under the modernisation for raising standards strategy.

5.5. Summary

In this chapter, I have discussed teacher policy developments in the third, final teacher policy area of employment and professional development, focusing on the five key policy themes of teacher qualification, employment, salary and working conditions, appraisal, and in-service training. In the early era governments, the 1846 Minutes instituted a national certification system for elementary teachers, granting them a non-civil service status. The 1862 Code introduced the payment by results system as an early form of PRP. National salary scales for teachers were introduced and determined through the Burnham system, separate from the government, and the Teachers' Registration Council was established and operated during the first half of the twentieth century. In the post-war era governments, teacher employment and in-service training were expanded in line with the educational expansion under the conditions of economic affluence and an expanding school population. Teachers in the maintained sector were required to have QTS and their working conditions were enhanced under the 1944 Act. The government allowed teachers' salaries to be determined on the basis of negotiations between the two panels of the Burnham system and the basic salary scale was applied to all qualified teachers.

Under the Thatcherite governments, there was a contraction in teacher employment with the falling school population. The government introduced a series of policies to centralise teachers' pay and working conditions. The Burnham system was replaced by the STRB to establish an integrated control over teachers' pay and conditions of service. Teacher appraisal was implemented on a national scale under the 1986 Act, and in-service training became privatised and school-based under the new INSET and GEST. In the New Labour governments, there was an increase in teacher employment under a climate of stable economic growth. Teachers' pay was linked again with their performance, appraised under the arrangements of PM, through the introduction of a modernised PRP system. The government revived the teachers' council by

establishing the GTCE, and paid much attention to CPD for life-long learning. Along with the school workforce reform, professional standards for teachers from trainees to heads were standardised systematically.

Chapter 6: Conclusions

This study has sought to explain the distinctive teacher policy developments since 1800 in England. To this end, I have demarcated the scope of teacher policy into the three areas of initial teacher training, curriculum and teaching, and employment and professional development, and have proposed an analytical framework with two separate sections – one for legacy influence analysis and the other for teacher policy process analysis. In accordance with this analytical framework, government strategies have been addressed in Chapter 2 and teacher policy on each of the three policy areas addressed in Chapters 3 to 5 respectively. In this concluding chapter, I will summarise research the findings, with a concluding remark on the thesis. Table 6.1 provides the summary of the research findings.

6.1. HILs in the Early Era Governments

In accordance with the analytical framework, this study has analysed teacher policy in the early era governments in terms of HILs. In the teacher policy area of initial teacher training, it was found that apprenticeship acted as a major HIL, shaping the prototype of school-based teacher training in England. The tradition of apprenticeship in teacher training at elementary level started to develop in the nineteenth century from the monitorial system in which able pupils, as monitors, taught other pupils in their class under the direction of schoolmasters. Following the industrial revolution, socio-economic situations of a rapid increase in the population, teacher shortages and financial difficulties for schools led to the prevalence of this system in the early part of the century. From 1846, the monitorial system developed into the pupil-teacher system, whereby the state finally initiated its intervention in teacher training at elementary level.

These two teacher training systems in the nineteenth century operated on the basis of apprenticeship, which reflects the perspective that teacher education was a practical matter rather than theoretical and that it should be delivered on an on-the-job-

Table 6.1 Summary of the research findings

Government		Initial teacher training	Curriculum and Teaching	Employment and professional development
Early era Governments	HILs	Apprenticeship: school-based training. Training colleges. UDEs.	Religious education. Three Rs. Central control over curricula and examinations (SC, HSC).	Teacher certification. Legal status of teachers. Payment by results system. National salary scales. Teacher's Registration Council.
Post-war era governments	Ideology	Social democratic consensus		
	SEs	Post-war reconstruction, post-war bulge, economic expansion until the 1960s and economic contraction from 1973		
		⇓		
	Strategy	Post-war partnership, Keynesian intervention		
		⇓		
	TPDs	Expansive/transformativ McNair/Robbins/James Reports. Institutes of education (ATOs). Emergency training scheme. Three-year certificate course. Colleges of education. Polytechnics and the CNA. New BEd and DipHE.	Unregulated/autonomous Unregulated curriculum. Compulsory religious education. Tripartite system. Comprehensive reorganisation. Child-centredness (Plowden) Three reports of CACE. GCE/CSE/SCCE.	Expansive/negotiation-based Expansive teacher employment. QTS and enhanced working conditions. Basic salary scale. Expansive in-service training.
	IILs	Institutional reorganisation. Growth of PGCE and BEd only.	Great Debate. Emphasis of core curriculum and a monitoring system.	Collapsing Burnham system. Growing concern for school-focused in-service training and teacher appraisal.
Thatcherite governments	Ideology	New Right and Thatcherism		
	SEs	Weakened powers of trade unions. High level of unemployment under firm monetary and fiscal policy.		
		⇓		
	Strategy	Privatisation/marketisation; raising central control		
		⇓		
	TPDs	Regulative/reformative CATE. Criteria for accreditation. HEI reform. Competences for QTS. New routes to teaching. TTA and Ofsted.	Centralised/marketised Increasing parental choice. SCCE disbanded. Financial measures. National Curriculum. Post-14 curriculum. New vocationalism. New qualifications frameworks.	Contractive/centralised/privatised Contractive teacher employment. Burnham system abolished. STRB established. Integrated control of teachers' pay and conditions. National teacher appraisal. Privatised/school-based INSET.
	IILs	SCITT and GTP. From competences to standards.	Choice and diversity for higher standards. Dearing Reports.	Move towards PRP. Reviews of the appraisal scheme. Concern for workforce management.
New Labour governments	Ideology	Third Way		
	SEs	Comparatively low unemployment and stability in inflation; growing concern for childcare; growing global competition in the knowledge-based economy.		
		⇓		
	Strategy	Modernisation for raising standards, new partnership.		
		⇓		
	TPDs	Prescriptive/school-based TDA with extended remit. Standards for QTS. National curriculum for ITT. PGCE dominance. Growth of SCITT. Expanding EBRs and flexible routes.	Specialised/prescriptive School diversity policy. Foundation Stage/EYFS. NLNS/PNS/PF. Key Stage 3 National Strategy. Curriculum 2000. Specialised Diplomas.	Expansive/performance-based/standardised Increasing teacher employment. School workforce reform. PRP and PM. GTCE and CPD. Professional standards.

training basis in schools. In teacher education, what should be emphasised between practice versus theory and schools versus HEIs has been a longstanding pedagogical issue, but this practice-oriented and school-based perspective on teacher training, embedded in the two systems, had an enduring effect on the patterns of teacher training in subsequent governments. The tradition of apprenticeship was rather weakened in the post-war era governments when the provision of teacher education was led by HEIs. However, it was revived in a modernised form with employment-

based routes to teaching and SCITT under the Thatcherite governments, later strengthened under the New Labour governments with the rapid growth of GTP and SCITT.

Furthermore, this study suggests that training colleges and UDEs, instituted in the early era governments, are important HILs. In the 1960s, the training colleges were renamed colleges of education after the Robbins Report, and were joined by polytechnics. Following the reorganisation process in the 1970s, they were integrated into the new category of colleges of higher education with other further education institutions in the public sector. Finally, many colleges of higher education, together with polytechnics, were granted university status following the Further and Higher Education Act 1992 ending the binary policy. The UDEs were started from the day training colleges which were established by universities following the 1890 Code. They played a leading role in the operation of the ATOs and still continue their main role of teacher training in universities.

In the area of curriculum and teaching, it was found that, as major HILs, religious education, the three Rs and early experiences of central control over curricula and examinations were influential in the teacher policy process. Before state intervention in education, an elementary education for working class children was provided by voluntary schools maintained by the Church of England and other denominations. The early-established power of the church embedded religious education and the three Rs in these voluntary schools as an institutional curriculum. Religious education was made compulsory by the 1944 Act, which still remains unchanged, comprising part of the basic curriculum under the 1988 Act. After state intervention, the three Rs were used as a means of identifying and raising pupils' standards of attainment under the payment by results system, introduced to ensure schools' accountability. Since the Great Debate, the accountability of schooling has been a central concern, and the three Rs emphasised again with the introduction of core subjects in the National Curriculum and the implementation of NLNS and the PNS.

This study suggests that the early experiences of central control over the school curriculum and examinations were influential in the policy process. After the 1862 Code, the government exerted a strong control over the elementary curriculum and

teaching by issuing a code annually until 1926. Providing grants to schools and classes in science and art subjects, the DSA established by 1895 a control over the post-elementary curriculum in these schools under the Directory with Regulations. Following the 1899 and 1902 Acts, the BoE exerted integrated control over the secondary curriculum and teaching under the new Regulations for secondary schools. The 1944 Act opened an era of teachers' professional autonomy, providing no provision for a compulsory curriculum except for religious education. However, central control over the curriculum and teaching was revived in the Thatcherite governments by applying the National Curriculum to primary and secondary education, which was extended to the foundation stage in the New Labour governments. The external examinations system, instituted in 1917 as a secondary-level academic qualification, has continued in its two-type structure. The SC and HSC were replaced in 1951 by the GCE O-Level and GCE A-Level respectively. In 1986, the government replaced the GCE O-Level with the GCSE, retaining the GCE A-Level.

In the area of teacher employment and professional development, it has been found that, as major HILs, the certification and legal status of teachers, the payments by results system, national salary scales, and the Teachers' Registration Council, instituted in the early era governments, have been influential in the teacher policy process. This study suggests that the Minutes of 1846 instituted the national certification system and teachers' legal status, which have maintained their basic structures to date. From the start, it was the government that certified elementary teachers on a national scale. Under the Joint Board system, teachers were examined by the Joint Examination Boards, but the government laid down the standards for certification and retained the power of certification. Under the 1944 Act and subsequent regulations, all teachers in maintained schools were required to have QTS, with some exceptions. The criteria or standards for QTS were specified in greater detail under the Thatcherite and New Labour governments. In addition, the non-civil service status for teachers, instituted under the 1846 regime, has continued to date.

This study has found that the main concept of the payment by results system, relating state grants (teachers' pay) to teachers' performance appraised by pupils' attainment, has been embedded in PRP and PM. In terms of teachers' pay, this study suggests that,

since the national salary scales for teachers and the Burnham system were instituted in the early era governments, teachers have been paid on the national pay scales determined regularly by a body separate from the government. Furthermore, it has been determined that the Teachers' Registration Council, which was established in 1902 as a result of the teachers' registration movement in the early era governments and abolished in 1949, was revived in the new form of the GTCE under the Blair government.

6.2. TPDs under the Strategies of the Post-War Era Governments

This study suggests that the post-war era governments employed two major strategies in the teacher policy process and that these were formed under the influence of certain political ideologies and socio-economic situations. In addition, it shows that the post-war consensus (social democratic consensus) acted as the main political ideology in the post-war era governments, providing a basis for the post-war partnership strategy and the Keynesian intervention strategy. This study has found that certain socio-economic situations such as the post-war reconstruction, post-war childbirth bulge, economic expansion until the 1960s and economic contraction from 1973 were influential on government strategies and in the teacher policy process. This study suggests that, under these strategies and socio-economic situations, the directions of teacher policy developments in the post-war era governments were expansive and transformative in initial teacher training, unregulated and autonomous in curricula and teaching, and expansive and negotiation-based in teacher employment and professional development.

In the area of initial teacher training, this study shows that the provision of initial teacher training in the post-war era governments was expanded along with the transformation of the HEIs and courses for teacher training. Following the McNair Report, institutes of education were established as ATOs validating training college courses. In the 1960s, training colleges were renamed colleges of education following the Robbins Report, and polytechnics began to provide initial teacher training courses validated by the CNAA. The growing demand for teachers, flowing from both the post-war reconstruction from war ravages and the post-war bulge, led the government

to implement the emergency training scheme from 1945 to 1951 and to defer the lengthening of training courses to three years. Improved teacher recruitment from the mid-1950s enabled the government to introduce the three-year certificate course from 1960. The four-year BEd course, introduced in 1964, became available until 1968 in all institutes of education and was followed by the new three/four-year BEd and DipHE courses pursuant to the recommendations of the James Report of 1972.

These expansive and transformative policy developments in initial teacher training were in line with government strategies. Under the post-war partnership strategy, the government enabled each ATO and the CNAA to be run by representatives of all the bodies concerned with teacher training, restraining itself from exerting too much control over them. Under the Keynesian intervention strategy, the government intervened actively in the provision of initial teacher training through the emergency training scheme, the appointment of the Robbins Committee with the aim of preparing a long-term plan for expanding higher education, the introduction of polytechnics, the appointment of the James Committee to review the teacher education system, and the planning of the reorganisation of teacher training institutions pronounced through the 1972 White Paper.

In the area of curriculum and teaching, the school curriculum in the post-war era governments became unregulated in the absence of statutory provisions, so that teachers in schools were substantially autonomous in their teaching. Apart from religious education, the 1944 Act did not lay down any regulatory provisions for the school curriculum, whereby central control over the school curriculum, wielded in the early era governments, was phased out and an era of teachers' professional autonomy in teaching was opened. With the post-war bulge and economic expansion, the school population increased consistently in the post-war period. The 1944 Act restructured the public education system in three progressive stages, and secondary education developed into the tripartite system on the basis of the eleven-plus selection. The secondary curriculum developed along the lines of this tripartite system without statutory regulations, and the three reports by CACE between 1954 and 1963 were the Conservative government's limited efforts to address criticisms of this system. The Plowden Report supported progressivism away from central control, emphasising the child-centred primary curriculum and teaching.

These unregulated and school-autonomous directions of policy development in curriculum and teaching were also in line with government strategies. The 1944 Act provided a legal basis for the post-war partnership in respect of the school curriculum, by delegating the responsibility for curriculum planning to LEAs and schools. The social democratic consensus, comprising the main part of the post-war partnership strategy, was reflected in the Plowden Report. Replacing the SSEC in 1964, the SCCE was in charge of both the curriculum and examinations. However, the government still maintained its post-war partnership strategy, enabling the SCCE to be constituted by a majority of teachers. Conversely, under the Keynesian intervention strategy, the government actively intervened in the provision of schooling, initiating comprehensive reorganisation with a view to ending selection in secondary education.

In the area of employment and professional development, teacher employment and in-service training in the post-war era governments were expansive, and teachers' salaries were determined largely on a negotiation basis under the Burnham system. With the growing school population, resulting from the post-war bulge and the raising of the school leaving age in 1947, the number of teachers employed in maintained primary and secondary schools increased continually in the post-war era governments. The 1944 Act required QTS for all teachers in maintained schools, but this did not prevent non-qualified or untrained teachers from being employed. Compulsory professional training was introduced by 1973 for all candidates intending to teach in maintained schools. The expansion of an in-service training provision was consistently recommended in the McNair, Newsom, Plowden, and James Reports. The provision of in-service training included supplementary, special and short courses and was consistently expanded with the growth of teachers' centres and the BEd for serving teachers. Under the 1944 Act, teachers' salaries were negotiated between the teachers' and employers' panels in the Burnham Committee, and limited salary differentials in favour of secondary (grammar) school teachers were pursued in a series of Burnham settlements in the post-war period via the use of various allowances and the unit total system.

Under the post-war partnership strategy, the government enhanced working conditions for teachers through the 1944 Act, which provided clearly-stated provisions for the appointment and dismissal of teachers and for the end of the

marriage bar. The single basic salary scale for all qualified teachers was introduced in 1945 and equal pay was achieved by 1961. The government applied the post-war partnership to the operation of the Burnham machinery, restraining itself from exerting too much control over it. Under the Keynesian intervention strategy, the government actively intervened in the planning of teacher recruitment by setting annual targets for teacher training places, in the Burnham negotiations by the Remuneration of Teachers Acts 1963 and 1965 and the economic incomes policy, and in the provision of in-service training initiated by the reports above and the 1972 White Paper.

6.3. IILs: Policy Changes towards the Thatcherite Governments

This study has conceptualised the changing pattern of teacher policy, taking place ahead of government change, by employing the concept of IILs. In this regard, it has been found that, during the period of economic contraction in the 1970s, the post-war era governments introduced a number of significant policies which paved the way for future directions of teacher policy in the Thatcherite governments. In the area of initial teacher training, the 1972 White Paper initiated the reorganisation process of HEIs in the public sector, leading the colleges of education to integrate into the category of colleges of higher education. The colleges of higher education were finally empowered to be granted university status under the 1992 Act. By the end of the 1970s, the PGCE had overtaken the BEd in terms of numbers, and has since maintained this major position in initial teacher training. The Callaghan government made entry to the teaching profession fully graduate, by phasing out the certificate courses and making all undergraduates take BEd courses only from 1980/81.

In the area of curriculum and teaching, the post-war partnership framework collapsed with Callaghan's Ruskin speech and the Great Debate, which put a strong emphasis on the accountability of schools and teachers to parents and industry, the core curriculum with commonly-mentioned five subjects, and the monitoring system for national standards. This emphasis reflected the government's move towards centralisation by limiting teachers' professional autonomy and facilitating the concept

of parental choice, as well as the introduction of the National Curriculum and its tests in the Thatcherite governments.

In the area of employment and professional development, the Burnham negotiations system declined in the 1970s through the intervention of two committees, appointed by the government, for special adjustments in teachers' pay. In 1978, the CLEA/ST reached agreements on conditions of service for teachers. The declining Burnham system and the new body for conditions of service paved the way for a unified system for salaries and conditions of service in the 1980s. With the decline of the SCCE and the economic depression in the 1970s, school-focused in-service training came to the attention of the government as an alternative to the traditional types provided by external institutions, and became more prevalent in the Thatcherite governments under the privatisation strategy. Following the Great Debate, the need for teacher appraisal increased with the emphasis on accountability, which was realised under the Thatcherite governments.

6.4. TPDs under the Strategies of the Thatcherite Governments

This study shows that the Thatcherite governments employed, as their major strategies, privatisation (marketisation) and raising central control, and that these were formed under the influence of certain political ideologies and socio-economic situations. It further identifies that Thatcherism and the New Right acted as the major ideologies in the Thatcherite governments, providing a basis for the two strategies. Certain socio-economic situations such as the high level of unemployment under firm monetary and fiscal policy, along with the weakened powers of trades unions, were influential on government strategies and in the teacher policy process. Under these strategies and socio-economic situations, the directions of the teacher policy developments in the Thatcherite governments were regulative and reformative in initial teacher training, centralised and marketised in curriculum and teaching, and contractive, centralised and privatised in employment and professional development.

In the area of initial teacher training, the directions of policy developments in initial teacher training under the Thatcherite governments were both regulative, with the introduction of criteria for the accreditation of courses, and reformative, with reforms of the accreditation system, HIEs and courses for teacher training. Circular 3/84 announced CATE's new accreditation system and first set out the criteria for the approval of courses. Circular 24/89 reconstituted CATE and strengthened these criteria. Circulars 9/92 and 14/93 introduced new criteria, with a focus on the competences of teaching, and placed emphasis on school-based teacher education. The 1992 Act ended the binary policy and introduced a new unitary higher education system through the abolishment of the CNAA and enabling HEIs in the public sector to be granted university status. The 1994 Act replaced CATE with the TTA.

These regulative and reformative policy developments were shown to be in line with government strategies. Under the raising central control strategy, the government exerted control over teacher education by setting the criteria for accreditation. Unlike the ATOs, the Secretary nominated the membership of CATE and TTA. The government weakened the position of HEIs by making teacher training more school-based and by introducing school-based training programmes such as ATS, LTS, and SCITT. The TTA, as the government's key institutional agent, was empowered to exert unified power over teacher education, and compliance to the criteria was secured by Ofsted's inspections. Additionally, the government applied its privatisation strategy to school inspections by introducing competition. Ofsted awarded inspection contracts by competitive tender so that LEAs had to compete with independent inspection teams.

In the area of curriculum and teaching, the directions of policy developments under the Thatcherite governments were centralised in the school curriculum and teaching via the introduction of the National Curriculum and Tests, and marketised with increasing parental choice and market competition. Following the concern for a core curriculum, the National Curriculum, containing ten foundation subjects, was introduced by the 1988 Act and applied to all compulsory-aged pupils at maintained schools between 1989 and 1997. Despite strong opposition from teachers, mandatory SATs for three core subjects began in 1991 with seven-year olds. Parents' choice and their role in school governing bodies were enlarged by the 1980 and 1986 Acts. The

1988 Act encouraged market competition in education by the introduction of open enrolment, LMS and GM schools.

These centralised and marketised policy developments in the curriculum and teaching were, again, clearly in line with government strategies. Under the raising central control strategy, the government attempted to introduce the core curriculum and replaced the teacher-dominated SCCE with the two smaller bodies of SEC and SCDC, thereby restraining teachers' professional autonomy. The 1988 Act represented the peak of the government's two strategies. With the National Curriculum, the tradition of central control in the early era governments was fully revived. Schools were exposed to market competition under the centralised and competitive funding regime. In response to the economic recession of the mid-1980s, the government implemented vocational initiatives including TVEI, YTS and CPVE, and enabled the MSC to play a key role in introducing market elements in the vocational curriculum and qualifications development.

In the area of employment and professional development, the directions of policy developments under the Thatcherite governments were contractive in teacher employment, centralised in teachers' pay and working conditions, and privatised and school-focused in professional development. Full-time teachers in maintained schools decreased in number, while the number of part-time qualified teacher increased consistently. The Burnham system was abolished after the dispute of 1984-1986. The 1987 Act addressed teachers' pay and conditions of employment in a single framework, and teachers' work was specified by Order in terms of professional duties and a working time of 195 days (1265 hours) a year. Teachers' pay and conditions became the remit of the STRB established by the 1991 Act. Between 1991 and 1995, teacher appraisal was implemented nationally in accordance with the provisions of the 1986 Act. Grants for the new INSET, containing ESGs, TRIST and LEATGS, were integrated in 1991 into the new unitary grants system of GEST, and in-service training became more privatised and school-based, with a great deal of funding devolved to schools under the GEST regime.

The government's tight budgetary control over educational spending, together with the falling school population, led to a continual decrease in the number of full-time

teachers. Under the raising central control strategy, the government constrained the power of teachers and LEAs in relation to teachers' pay and conditions by replacing the Burnham system with the STRB, and exerted control over not only teacher pay, but also conditions of employment by statutory instrument. Moreover, the government was empowered by the 1986 Act to appraise teachers' performance, and its two strategies were clearly shown in the privatised and school-based in-service training. The government determined the national priorities in in-service training and made in-service training privatised and school-based by devolving budgets to schools and introducing a competitive bidding system to the new INSET and GEST, restraining the role of LEAs and HEIs in in-service training.

6.5. IILs: Policy Changes towards the New Labour Governments

Before the government changed to New Labour the Major government introduced some significant policies and drives which paved the way for future directions of teacher policy in the New Labour governments. In the area of initial teacher training, this study suggests that SCITT, GTP, and the drives to introduce both standards for QTS and the National Curriculum for ITT, under the Major government, acted as major IILs. SCITT was launched in 1993 as a pilot scheme under the Major government and has been continually expanded in the New Labour governments. The GTP was proposed in 1996 by the Major government and has grown into a leading EBR under the New Labour governments. The TTA's drive toward changing competences to standards for QTS before government change led to Circular 10/97 in the Blair government, and the move to develop a National Curriculum for ITT was realised by Circulars 10/97 and 4/98 in the Blair government.

In the area of curriculum and teaching, the policies of choice, diversity and specialisation for standards and the drive by Dearing Reports to make the curriculum and qualifications framework flexible under the Major government acted as major IILs. The main direction of the school diversity and specialisation policy, embodied by the 1992 and 1996 White Papers and the 1993 Act under the Major government, continued and was, to some degree, strengthened in the New Labour governments.

The 1993 and 1996 Dearing Reports initiated a policy stream to make the rigid National Curriculum flexible. The reports also saw the 14-19 curriculum as an effective framework for continuity, maintaining the academic and vocational division in the national qualifications framework. This policy stream has since continued under successive New Labour governments.

In the area of employment and professional development, the drive toward linking performance with pay, reviews of the teacher appraisal scheme, and growing concern for workforce management in the Major government acted as major IILs. A number of PRP elements for heads and classroom teachers were introduced in 1991 and 1993 as a push toward linking teachers' performance with their pay, and PRP has been a key pay system in the New Labour governments ever since. The reviews of the national teacher appraisal scheme under the Major government presented the view that teacher appraisal should be addressed as part of an integrated system for managing performance, which has been maintained by PM in the New Labour governments. The Major government's growing concern for workforce management led to the two surveys by the STRB of teachers' workloads and to guidance on supply teachers. This policy stream of workforce management developed into the school workforce reform in the New Labour governments.

6.6. TPDs under the Strategies of the New Labour Governments

This study argues that the New Labour governments employed, as their major strategies, modernisation for raising standards and new partnership, and that these were formed under the influence of certain political ideologies and socio-economic situations. It shows that the Third Way acted as the main political ideology in the New Labour governments, providing a basis for the two strategies. Certain socio-economic situations such as comparatively low unemployment and inflationary stability, a growing concern for childcare and mounting global competition in a knowledge-based economy were influential on government strategies and in the teacher policy process. Under these strategies and socio-economic situations, the directions of the teacher policy developments in the New Labour governments were prescriptive and school-

based in initial teacher training, specialised and prescriptive in curriculum and teaching, and expansive, performance-based and standardised in employment and professional development.

In the area of initial teacher training, the directions of policy developments were prescriptive, with the specified standards for QTS under the strengthened TTA/Ofsted regime and more school-based, along with the growth of SCITT, ERBs and flexible routes to teaching. Circulars 10/97 and 4/98 introduced standards for QTS specification in more detail than the previous circulars, by setting out the required competences. These standards were replaced by the 2002 document setting out more concise standards. However, the new standards were complemented by the TDA's handbook of guidance, which is now used as a key document for Ofsted inspections. Since its inception, SCITT has marked a stable growth through continued support by government. With the growth of SCITT, the introduction of various EBRs, including GTP, RTP and OTTP, has made teacher training more school-based. More flexibility has been added to teacher training by schemes such as flexible PGCE, Fast Track and Teach First.

These prescriptive and school-based policy developments were in line with government strategies. Under the modernisation for raising standards strategy, the government introduced the QTS standards and the National Curriculum for ITT in order to secure 'high standards' in teaching for global competition in the knowledge-based economy, using the TTA (TDA) and Ofsted as its key institutional agents. The new partnership strategy is reflected in the provision of teacher training. New Labour has emphasised partnership-based teacher training provision as a means of raising standards and has encouraged schools and businesses to participate as major partners equivalent to HEIs. All SCITTs, EBRs and Teach First are operated on the basis of partnerships. With the growth of school-based teacher training, schools are now acting as key institutions for teacher training.

In the area of curriculum and teaching, the directions of policy developments are specialised in relation to the school diversity policy and prescriptive for curricular policies for each child stage. The 1998 Act designated schools into one of three categories. Under the school diversity policy, various school diversity programmes

including EAZ, EiC, academies, and beacon schools were introduced and schools encouraged to specialise according to their character and areas of expertise. The specialist schools programme grew under the New Labour governments to cover almost all secondary schools. The foundation stage for children aged three to five was introduced in 2000 and incorporated by the 2002 Act into the National Curriculum. The EYFS for children aged from birth to five became mandatory from September 2008 by the introduction of the Childcare Act 2006. Literacy and numeracy, together with a prescribed curriculum and teaching methods, were emphasised by NLNS at key stages 1 and 2 and by the key stage 3 national strategy. The 14-19 curriculum and qualifications were greatly detailed with the introduction of Curriculum 2000 and new diplomas, maintaining the status of GCSEs and A-Levels.

The school diversity policy itself reflects the government's two strategies. This policy was implemented to raise standards in schooling, and school diversity programmes were operated on the basis of partnerships between schools, local authorities, businesses, and communities. The government made, under the raising standards strategy, a series of curricular policies from the EYFS to the 14-19 curriculum, and implemented them on the basis of the new partnership strategy by joining up the provision for childcare with the EYFS and the Primary Framework and by enabling all diplomas to be developed by the participation of employers, schools, HEIs and awarding bodies.

In the area of employment and teaching, the directions of policy developments were expansive in teacher employment, performance-based in teacher appraisal and pay, and standardised in professional development. There was a stable increase until 2006 in the number of full-time equivalent teachers employed in the maintained schools. Teachers' workload and conditions of service were addressed in the context of the school workforce reform based on the National Agreement in January 2003, and support staff, including teaching assistants, increased consistently in number with the reform. New Labour addressed teacher appraisal and pay in the context of PM and established the new PRP system in which teachers' pay was individualised with the introduction of new posts with different pay scales. Following the establishment of the GTCE, professional development was restructured by the 2001 document employing the notion of CPD, and became an integrated part of the workforce reform and PM.

Professional development was standardised with the establishment of professional standards for each stage of the profession from QTS for trainees and to the NPQH for heads.

In terms of government strategies, under the raising standards strategy the government introduced the skills tests as requirements for teachers' employment. The school workforce reform reflected the government's two strategies. The government implemented the reform on the basis of the new partnership between government, employers and school workforce unions, aiming at raising standards in schooling as well as reducing teacher workload. Under the raising standards strategy, New Labour introduced PM and the PRP system in order to attract and retain able teachers by rewarding good performance. The government, under its new partnership strategy, enabled the GTCE to regulate the teaching profession and, under its raising standards strategy, required it to contribute to improving standards in teaching and learning. The government's raising standards strategy reached its peak with the establishment of the systematic framework for professional standards through introducing statutory induction for NQTs and the NPQH for heads.

6.7. Concluding Remark

The research findings above have implications for the key concepts employed in this study. In terms of HILs, the findings suggest that some policy developments in early era government have had a longstanding effect on the future policies of subsequent governments. HILs are a concept developed on the basis of the path-dependent perspective of historical institutionalism, so we can conclude that teacher policy in England has developed to some degree path-dependently. Some HILs in the early era governments have continually influenced subsequent policy processes. Meanwhile, the effects of some other HILs on subsequent policy processes have appeared clearly in the Thatcherite or New Labour governments, taking on revived and modernised forms. The continual and intermittent effect of HILs reflects the influence of political ideologies and socio-economic situations in the policy process. Liberalism, prevalent in the early era governments, has been revived in the name of neo-liberalism

comprising the main pillar of New Right and influencing the Third Way. The early era governments' central control over schooling was instituted in socio-economic situations demanding the intensified accountability of schooling, which has been re-emphasised since the Great Debate with more strengthened central control.

This study has employed the concept of IILs to explain the pattern and effect of policy changes around the time of government change, and the research findings suggest that some distinctive policy directions took shape before government change, and these directions continued in the incoming governments. In this regard, it can be said that IILs are a reflection of changing political ideologies and socio-economic situations around the time of government change. The post-war consensus began to collapse at the time of the Great Debate when the British economy was in the middle of economic crisis, and neo-liberalism and growing concern for the accountability of public services began to emerge. Global competition has been more intensified since the 1990s with the emergence of the globalised and knowledge-based economy. Under this changing socio-economic situation, some policy directions, initiated by the Major government under New Right ideologies, could be continued in the New Labour governments under the Third Way, containing much of the flavour of the New Right.

Employing the state-centred approach, this study has positioned government as the main actor in the policy process, through its own strategies. The research findings suggest that most policy developments, if not all, have been made in accordance with government strategies shaped under the influence of certain political ideologies and socio-economic situations. In this study, we can see that central control over the three teacher policy areas has been progressively strengthened. The post-war era governments allowed the maximum role in the policy process of churches, HEIs, LEAs, schools and teachers. The Thatcherite governments strikingly strengthened their control over the three areas, alienating HEIs, LEAs, teachers and their unions in the policy process, exposing schools to market competition, and utilising a competitive bidding system. The New Labour governments have encouraged LEAs and teachers, together with other partners, to participate in the policy process, but they have exerted more intensified control by issuing a large number of documents

containing more detailed guidance and covering wider areas with an integrated view of public services reform.

As mentioned in Chapter 1, the two primary aims of this study were to shape teacher policy into a theme of study in England, and to explain teacher policy developments historically by employing an analytical framework consisting of these key concepts above. In this regard, this thesis contributes to educational research by providing a new insight into policy analysis. First of all, this thesis, as a pioneering study, suggests a new area for study, addressing teacher policy as an independent theme. Before this study, teacher policy tended not to be treated as a separate theme of study in England – even the term ‘teacher policy’ was rarely used in previous studies. In this study, I have provided a new scope for teacher policy by demarcating its scope into three policy areas, each of which has its own policy themes. In particular, this study includes the teacher policy area of curriculum and teaching which has tended to be a separate policy area, only weakly related to teacher policy in previous studies. However, this thesis suggests that curriculum and teaching should be included in the main teacher policy areas, providing analytical explanations of the influences of the policies in this area on teachers and their profession.

More importantly, this thesis provides a new model for teacher policy analysis, employing an analytical framework devised for causally analytical historical study. For the last two decades, the inclination among scholars has been to focus on the study of policies covering the relatively short and recent periods of the Thatcherite and New Labour governments. By contrast, this study addresses teacher policy since state intervention in education was initiated in the nineteenth century, and attempts to explain the causal patterns of teacher policy change between the four government groups identified. In analysing these causal patterns, I have employed the two key concepts of HILs and IILs based on the perspectives of historical institutionalism. As discussed, this study shows that the effects of a number of significant policies in the early era governments on the subsequent policies have been influential in the policy process over time. Through the concept of HILs, this study shows the importance and influence of history in the policy process. In this regard, this thesis contributes to awakening awareness of the importance of history, thereby bringing it back into such academic studies.

Using the concept of IILs, this study also shows that many significant changes in policy directions, which seem to emerge abruptly after government change, tend to start prior to government change, i.e. there are policy linkages between the previous and incoming governments. As discussed in Chapter 2, this study suggests that the three groups of government have their own strategies under/with the influence of certain political ideologies and socio-economic situations, and most policies are, as strategic actions of the government which act as the main actor in the policy process, in line with these governments' strategies. Changing political ideologies and socio-economic situations can act as crucial dynamics in bringing about government change, and their effects on teacher policy are conceptualised by the concept of IILs. In this regard, through the concept of IILs, together with other key concepts discussed above, this study provides an effective analytical tool for causal explanations to the questions 'What?', 'Why?' and 'How?' certain policies or policy directions change and continue between the preceding and incoming governments.

In sum, this study deals first with teacher policy as a distinctive theme of study in England, and explains systematically major teacher policy developments in the three teacher policy areas in accordance with a clearly defined analytical framework for historical analysis. Hence, this study will be helpful for the people seeking a comprehensive understanding of teacher policy developments in political, socio-economic and historical contexts, and help them to gain an insight into historical analysis. However, this study also has some limitations. It focuses on teacher policy made by central government, thereby excluding local level policy developments which can take place in different contexts. More importantly, this study addresses documented policies, analysing a large number of impersonal policy documents. It is obvious that there may be a gap between policy developments in documents and policy developments in practice. This gap can be reduced by using alternative personal data sources from teachers and other people concerned. In this regard, this thesis should not be considered as the end of teacher policy study. Rather, it should be regarded as an introduction to what can be done for further study.

With regard to dividing history into periods, this study also provides some implications for further study. In terms of HILs, this study has treated the period 1800-1943 as a single historical era, in consideration of limited time and available

space. However, for a more elaborate historical analysis, this period needs to be divided into more phases to which the second section of the analytical framework can be applied. As we can see in this study, the political and socio-economic situations between the second half of the nineteenth century and the first half of the twentieth century are very different, and the latter period also has many different political and socio-economic contexts.

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NB: References for the policy documents used in this study, including those accessed through the HCPP website, are categorised in accordance with the government departments and organisations shown on these documents, using their acronyms. Most command papers (C, Cd, Cmd, Cmnd, Cm) and other parliamentary papers, loaded on the HCPP website (<http://parlipapers.chadwyck.co.uk/>), can be sought by using their own command paper number, parliamentary sessional paper number, or the title shown in the references of this study.

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Appendices

Appendix 2.1. Urbanisation in England and on the Continent

	1600	1700	1750	1800
England	6.1	13.4	17.5	24.0
North and west Europe minus England	9.2	12.8	12.1	10.0
Europe minus England	8.1	9.2	9.4	9.5

Source: Hudson (1992: 150)

Appendix 2.2. UK government's annual budgets, 1913-1921 (£ m)

Financial Year	Revenue	Expenditure	Surplus or Deficit
1913-14	198.2	197.5	+0.7
1914-15	226.7	560.5	-338.8
1915-16	336.8	1,559.2	-1,222.4
1916-17	573.4	2,198.1	-1,624.7
1917-18	707.2	2,696.2	-1,989.0
1918-19	889.0	2,579.3	-1,690.3
1919-20	1,339.6	1,665.8	-326.2
1920-21	1,426.0	1,195.4	+230.6

Source: Pollard (1969: 66)

Appendix 2.3. General elections and Prime Ministers, 1945-79

Election year	Numbers of seats in HC		Ruling party	Prime Minister	Dates in office
	Conservative	Labour			
1945	213	393	Labour	Clement Attlee	1945-51
1950	299	315	Labour		
1951	321	295	Conservative	Winston Churchill	1951-55
1955	345	277	Conservative	Anthony Eden	1955-57
1959	365	258	Conservative	Harold Macmillan	1957-63
				Alec Douglas-Home	1963-64
1964	304	317	Labour	Harold Wilson	1964-70
1966	253	363	Labour		
1970	330	288	Conservative	Edward Heath	1970-74
1974 (Feb)	297	301	Labour	Harold Wilson	1974-76
1974 (Oct)	277	319	Labour	James Callaghan	1976-79
1979	339	269	Conservative	Margaret Thatcher	1979-90

Source: adapted from Kavanach (1990: 95)

Appendix 2.4. Major privatisations in the UK

Year of first share sale	Organisation (Industry)
1979	British Petroleum (Oil)
1980	National Enterprise Board Investments (Various)
1981	British Aerospace (Aerospace), Cable & Wireless (Telecoms)
1982	Amersham International (Scientific goods), National Freight Corporation (Road transport), Britoil (Oil)
1983	British Rail Hotels (Hotels), Associated British Ports (Ports)
1984	British Leyland/Rover (Car producer), British Telecom/BT (Telecoms), Enterprise Oil (Oil), Sealink (Sea transport)
1985	British Shipbuilders & Naval Dockyards (Ship building)
1986	National Bus Company (Transport), British Gas (Gas)
1987	Rolls-Royce (Aero-engines), British Airports Authority (Airports), British Airways (Airlines), Royal Ordnance Factories (Armaments)
1988	British Steel (Steel)
1989	Water (Water)
1990	Electricity distribution (Electricity)
1991	Electricity generation (Electricity)
1992	Trust Ports (Ports)
1995	Coal industry (Coal), Railways (Railways)
1996	Nuclear energy (Electricity)

Source: Martin and Parker (1997: 2)

Appendix 2.5. Dimensions of the Third Way

Dimension	Old Left	Third Way	New Right
Approach	Leveller	Investor	Deregulator
Outcome	Equality	Inclusion	Inequality
Citizenship	Rights	Both	Responsibilities
Mixed economy of welfare	State	Public/private civil society	Private
Mode	Command and control	Co-operation/partnership	Competition
Accountability	Central state/upwards/national	Both?	Market/downwards/local
Social expenditure	High	Pragmatic	Low

Source: Powell (2000: 42)

Appendix 3.1. Pupil-teachers and bursars firstly recognised in England

Year	Pupil-teachers commencing	Bursars	
		Boys	Girls
1906/07	11,018	-	-
1907/08	10,297	637	1,406
1908/09	5,209	1,112	2,393
1909/10	3,850	1,090	2,251
1910/11	2,612	723	2,041
1911/12	1,955	723	2,135
1912/13	1,469	614	2,225
1913/14	1,454	598	2,434

Source: BoE (1914: 149)

Appendix 3.2. Day training colleges established between 1890-1902

1890	Manchester, Newcastle, Cardiff, London (Kings), Birmingham, Nottingham
1891	Sheffield, Cambridge, Liverpool, Leeds
1892	Bristol, Aberystwyth, Oxford, London (University College)
1894	Bangor
1899	Reading, Southampton
1901	Exeter
1902	London Day Training College (now the University of London Institute of Education)

Source: Thomas (1990: 14)

Appendix 3.3. Student numbers in day training colleges, 1891/92-1900/01

Year	First year	Second year	Third year
1891/92	233	164	-
1892/93	322	128	14
1893/94	359	343	59
1894/95	384	367	55
1895/96	355	397	62
1896/97	413	374	54
1897/98	465	428	63
1898/99	495	457	98
1899/00	593	505	98
1900/01	635	596	124

Source: Tuck (1973: 81)

Appendix 3.4. Training college provision, 1850-1913

Year	Number of Colleges	Number of student places provided
1850	16	991
1860	34	2,388
1870	34	2,495
1880	41	3,275
1890	49	3,679
1900	61	6,011
1905	72	8,987
1910	85	12,625
1913	87	13,093

Source: BoE (1914: 5)

Appendix 3.5. Students trained for work in secondary schools, 1909/10-1913/14

Year	Men Trained	Women Trained	Total
1909-10	35	139	174
1910-11	30	133	163
1911-12	43	156	199
1912-13	38	178	216
1913-14	38	167	205

Gosden (1972: 214)

Appendix 3.6. Entrants under the emergency scheme and their previous education

Type of education	Men	Women
Elementary	2,981	1,119
Senior non-selective	793	352
Selective Control without School Certificate	1,815	687
Selective Control with School Certificate	334	99
Secondary without School Certificate	5,235	3,653
Secondary with School Certificate	9,558	4,726
Secondary with Higher Certificate	645	289
Technical without National Certificate	1,455	564
Technical with Ordinary National Certificate	131	54
Technical with Higher National Certificate	13	2
University without degree	311	84
University with pass degree	144	53
University with honours degree	12	2
Private tuition	42	39
Overseas	339	197
Total	23,808	11,920

Source: MoE (1950: 161)

Appendix 3.7. Students admitted to courses of initial training, 1952/53 to 1959/60

Type of course	1952-53	1953-54	1954-55	1955-56	1956-57	1957-58	1958-59	1959-60
Postgraduate								
UDEs	2,752	2,566	2,514	2,372	2,474	2,626	2,772	3,186
Training colleges	269	242	204	210	219	276	340	314
Four-year combined degree and training	-	-	-	-	21	78	133	148
General								
One-year								
UDEs	-	-	5	24	36	16	14	11
Training colleges	257	229	170	89	103	131	207	259
Two-year	10,101	10,230	10,669	10,698	11,211	11,750	12,618	13,708
One-year specialist								
Art	504	447	438	429	402	413	417	418
Technical	278	259	263	281	330	362	447	483
Other								
UDEs	..	..	..	-	2	2	3	69
Training colleges	..	..	..	58	45	68	79	105
Three-year specialist (women)								
Housecraft	708	741	761	778	812	858	819	818
Physical education	301	282	338	325	326	367	342	390
All students								
UDEs	2,752	2,566	2,519	2,396	2,512	2,644	2,789	3,266
(women)	1,116	1,103	1,146	1,113	1,127	1,062	1,132	1,298
Training colleges	12,418	12,430	12,843	12,868	13,469	14,303	15,402	16,653
(women)	9,347	9,389	9,710	9,749	10,192	10,596	11,045	11,523
Total	15,170	14,996	15,362	15,264	15,981	16,947	18,191	19,919
(women)	10,463	10,492	10,856	10,862	11,319	11,658	12,177	12,821

Source: MoE (1962d: 66)

Appendix 3.8. Students admitted to courses of initial training, 1961-1974

	1961	1963	1965	1967	1970	1972	1974
UDEs							
One-year courses							
Post-graduate	3,153	3,339	3,612	4,197	4,962	5,134	4,670
General	13	26	4	1		62	86
Specialist	66	76	76	62	85	70	71
Technical	-	-	-	-	-	-	30
Two-year post-graduate course	-	-	-	-	12	7	2
Four-year general courses	-	-	-	4	10	11	19
Total	3,232	3,441	3,692	4,264	5,069	5,284	4,878
(women)	1,272	1,424	1,762	2,180	2,659	2,674	2,532
Colleges of education							
One-year courses							
Post-graduate	311	501	558	976	2,588	5,128	4,650
General	206	142	142	113	351	562	421
Specialist	163	247	385	478	547	615	544
Two-year courses	782	956	1,233	2,029	1,242	969	765
Three-year and four-year courses	15,323	19,640	27,298	32,591	34,044	34,859	28,921
Total	16,785	21,486	29,616	36,187	38,772	42,133	35,301
(women)	11,706	15,002	21,298	26,103	27,900	28,939	25,720
DEs in polytechnics							
One-year courses							
Post-graduate						96	150
General					43	54	30
Specialist						21	32
Two-year courses	-	-	-	-	25	36	22
Three-year and four-year courses	-	-	-	563	787	828	924
Total	-	-	-	563	855	1,035	1,158
(women)	-	-	-	388	596	695	812
Art teacher training centres	488	519	689	499	765	800	667
(women)	239	267	396	266	384	420	342
Colleges of education (technical)	511	815	879	1,144	1,058	1,380	1,253
(women)	89	124	179	273	315	343	420
Total	21,016	26,261	34,876	42,657	46,519	50,632	43,257
(women)	13,306	16,817	23,635	29,210	31,854	33,071	29,826

Source: DES (1972c: 2; 1976b: 3)

Appendix 3.9. Quality assurance in higher education

Current arrangements			Proposed arrangements
	Universities	Polytechnics and Colleges	Universities, Polytechnics & Colleges
Quality control	Institutions	Institutions	Institutions
Quality audit	Academic Audit Unit (CVCP)	CNAA	Single quality audit unit independent of the new HE Funding Councils (institutional representatives and independent members)
Validation	Self-validation	Effective self-validation for accredited institutions Universities or CNAA for others	Degree awarding institutions
Quality assessment	Subject advisers	HMI	Quality assessment units for each new Council
For HE Funding Councils			
For Secretaries of State	UFC	HMI	New HE Funding Councils bases on the advice from their assessment units and other sources

Source: DES (1991a: 31)

Appendix 3.10. Alternative routes to QTS available in 1991-92

	Route and award	Length	Distinctive features
Undergraduate			
	Shortened BEd	2 years	For students with relevant experience and at least one year's successful higher education study (e.g. HND/HNC)
	Shortened BA/BSc (QTS)	3 years	Reduced emphasis on certain aspects of subject study. Route open to students with HNC/BTec
Postgraduate			
	Part-time PGCE	2 years	Mostly secondary shortage subjects
	Conversion PGCE	2 years	Mostly secondary shortage subjects. Students had a degree in a subject other than that for which they were training
	Articled Teacher Scheme (PGCE)	2 years	LEA involvement. Students spent 80 per cent of their time in schools and 20 per cent of their time in the higher education institution
Non-graduate			
	Licensed Teacher Scheme	2 years	LEA schemes. Licensed teachers based full-time in schools with release for training. Can be non-graduates

Source: Furlong et al.(2000: 47)

Appendix 3.11. Inspection contracts between autumn 1993 and summer 1994

Date	LEA contractor (%)	Independent contractor (%)	Number of inspections
Autumn 1993	77.3	22.7	392
Spring 1994	62.7	37.3	314
Summer 1994	52.2	47.8	184

Source: Matthews and Smith (1995: 24)

Appendix 3.12. Phases of the institutional development of TTA

Phases	Main functions assumed/changed
Shaping Phase (1994-1995)	Advice on teaching as a career from the TASC unit of the Department (1994.10) Licensed and overseas trained teacher schemes from the Department (1995.4) Full responsibility for funding ITT in HEIs from the HEFCE (1995.8) Supporting a strategic approach to CPD of teachers (1995.10)
Expansive Phase with increased remits (1996-1998)	Developing a National Curriculum for ITT (1996) Quality assurance of approved training providers in England and Wales (1997) Establishment of the TTA Unit in Wales (1997) Secondary Shortage Subject Scheme (SSSS) (1997.10) Advice on induction arrangements for NQTs (1997.10) Advice on Advance Skills Teacher (1997.10) Developing arrangements for fast-tracked teachers to leadership positions in schools (1997.10) Developing national standards for SEN specialists (1997.10) Developing and strengthening the NPQH (1997.10) Reviewing the HEADLAMP scheme for newly appointed heads (1997.10) Advice on a training programme for existing heads (1997.10) Advice on management training priorities and career ladders for teaching assistants (1997.10) Supporting the development of the New Opportunities Fund (NOF) (1997)
Down and Up Phase with an emphasis on recruitment (1999-2004)	CPD transferred to DfEE (1999) Headship and leadership programmes transferred to DfEE (1999.7) TTA Unit in Wales transferred to the National Assembly for Wales (1999.12) New tasks stemming from 1998 Green Paper: the establishment of flexible ITT provision, the introduction of computer-based skills tests for QTS, the build-up of the assessment of QTS, and the improvement of pre- and in-course study for trainee teachers (1999) Implementing a new marketing strategy to increase the number and quality of recruits to teaching along with an increased budget (2000) Regained responsibility for CPD from DfES (2004.9)
Reformative Phase with a new framework (2005 ~)	Continuing to have responsibility for all previous aspects of ITT with a renamed body, the Training and Development Agency for schools (TDA) (2005. 9) Taking on a wider role – the training and development of the whole school workforce including support staff and CPD for serving teachers (2005. 9)

Source: constructed from TTA (2003), Ellis (2006)

Appendix 3.13. Phases of the institutional development of Ofsted

Phases	Inspection Sectors Assumed	Legislation
Early Phase with the regular inspection of schools (1992-1996)	Maintained schools Independent schools Teacher education Youth services Young offender institutions, prisons, secure units and training centres by invitation of the lead inspectorate	Education Act 1944 Teacher and Higher Education Act 1988 Children Act 1989 Education Act 1992 School Inspections Act 1996
Expansive Phase alongside other inspection organisations (1997-2006)	Local Education Authorities Nursery education Post-compulsory education in association with the Adult Learning Inspectorate (ALI) Connexions partnerships Childminding and day-care provision	Education Act 1997 School Standards and Framework Act 1998 Learning and Skills Act 2000 Care Standards Act 2000
Reformative Phase with a single inspectorate for children and learners (2007 ~)	Remit of the Adult Learning Inspectorate (ALI) Children's services responsibilities of CSCI Children and families elements of HMICA	Education and Inspections Act 2006

Source: constructed from Matthews and Sammons (2004:14-15); DfES (2007a); Ofsted (2007a)

Appendix 3.14. Headings of documents on competences and standards

Headings of lists of competences		Headings of lists of standards	
Secondary list (Circular 9/92)		Primary and Secondary list (Circular 10/97, 4/98)	
	Subject knowledge Subject application Class management Assessment and recording of pupil's progress Further professional development		Knowledge and understanding Planning, teaching and class management Monitoring, assessment, recording, reporting and accountability Other professional requirements
Primary list (Circular 14/93)			
	Curriculum content, planning and assessment (a) Whole curriculum (b) Subject knowledge and application (c) Assessment and recording of pupils' progress Teaching strategies (a) Pupils' learning (b) Teaching strategies and techniques Further professional development		

Appendix 3.15. The structure of Circular 4/98

Contents		Application (From Sep. 1998)
Introduction		
Summary of requirements		
Annex A	Standards for the award of qualified teacher status	All trainees seeking QTS if not specified.
Annex B	Initial teacher training curriculum for the use of information and communications technology in subject teaching	Primary/secondary ITT courses (providers and trainees)
Annex C	Initial teacher training curriculum for primary English	Primary ITT courses (providers and trainees)
Annex D	Initial teacher training curriculum for primary mathematics	
Annex E	Initial teacher training curriculum for science	
Annex F	Initial teacher training curriculum for secondary English	Secondary ITT courses (providers and trainees)
Annex G	Initial teacher training curriculum for secondary mathematics	
Annex H	Initial teacher training curriculum for secondary science	
Annex I	Requirements for all courses of initial teacher training	All ITT courses

Appendix 3.16. The main structure of Circular 4/98 and DfES 2002

Circular 4/98		DfES/TTA, 2002	
Annex A: Standards for the award of qualified teacher status		(Section 1) Standards for the award of qualified teacher status	
	A. Knowledge and understanding B. Planning, teaching and class management C. Monitoring, assessment, recording, reporting and accountability D. Other professional requirements		1. Professional values and practice 2. Knowledge and understanding 3. Teaching 3-1. Planning, expectations and targets 3-2. Monitoring and assessment 3-3. Teaching and class management
Annex B-H: Initial teacher training curriculum			
Annex I: Requirements for all courses of initial teacher training		(Section 2) Requirements for initial teacher training	
	A. Trainee entry and selection requirements B. Course length and coverage C. Partnership requirements D. Quality assurance requirements		R1. Trainee entry requirements R2. Training and assessment R3. Management of the ITT partnership R4. Quality assurance

Appendix 3.17. Current routes and programmes of ITT

Providers		Routes/programmes	Type	Duration
HEIs	Universities Colleges Other HEIs	BEd	Undergraduate	3-4 years (full time) 4-6 years (part time)
		BA/BSc with QTS	Undergraduate	3-4 years (full time) 4-6 years (part time)
		PGCE	Postgraduate	1 year (full time) 2 years (part time)
Non-HEIs	SCITT providers	SCITT	Postgraduate	1 year (full time)
	EBIRITT providers	GTP	Employment based	1 year
		RTP	Employment based	2 years
		OTTP	Employment based	1 year (full time, the longest)
		Teach First	Employment based (Postgraduate)	2 years
		QTS only	Assessment only route	

Source: constructed from TDA (2009a)

Appendix 3.18. Current employment-based routes to QTS

Rout	Distinctive Features	Schools and Funding
GTP	For graduates, tailored to individual needs. Targeting mature people needing to continue earning while they train. Schools employ them as an unqualified teacher.	The TDA funds EBRITTPs to pay grants to support training in maintained schools, non-maintained special schools, city technology colleges, city colleges for the technology of the arts and city academies.
RTP	For non-graduate with a minimum of two years of higher education. Trainees complete a degree while they train and work as a teacher. Targeting mature people needing to continue earning while they train. Schools employ them as an unqualified teacher.	
OTTP	Enabling overseas-trained teachers to be qualified to teach in English schools. Candidates must be working as an unqualified teacher in a school in England.	

Source: constructed from TDA (2009a)

Appendix 3.19. Entrants of EBRs to teaching, 1999-2008

(): Primary

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
GTP	870 (450)	1,510 (650)	3,220 (1,200)	3,770 (1,240)	5,230 (1,860)	5,470 (1,960)	5,490 (1,940)	5,360 (1,850)	5,300 (1,780)
RTP	60 (20)	90 (70)	150 (100)	200 (140)	210 (150)	280 (200)	220 (160)	180 (140)	150 (120)
OTTP		190 (110)	760 (310)	830 (330)	1,220 (500)	1,560 (590)	1,330 (580)	1,580 (720)	1,300 (550)
Total	930	1,790	4,130	4,800	6,660	7,310	7,050	7,120	6,750

Source: DfES (2004h: 14; 2005j: 14), DCSF (2008n: A2)

Appendix 4.1. Comparisons of charity schools and Sunday schools

	Charity schools	Sunday schools
Type	Full-time day school (Some schools had boarders)	Part-time school on the Sabbath
Denomination	The Church of England	The Church of England (dominant), other various denominations
Voluntary body	Society for Promoting Christian Knowledge (1698)	Society for the Establishment and Support of Sunday Schools (1785)
Curriculum	Religious instruction and reading (essential) Writing, arithmetic, manual work	Religious instruction and reading (essential) Writing, arithmetic, manual work
Teaching method	Mechanical (rote learning and catechism)	Mechanical (rote learning and catechism)
Main reading material	The Bible (Scriptures) and religious manuals	The Bible (Scriptures) and religious manuals
Teacher status	Full-time paid teachers	Paid teachers (early), voluntary teachers (later)
Contribution	Day school development	Universal education development

Constructed from Jones (1938), Barnard (1961), Neuburg (1971), Snell (1999)

Appendix 4.2. Standards under Article 48 of the Revised Code of 1862

48	Reading	Writing	Arithmetic
Standard I (6-7 years)	Narrative in monosyllables.	Form on blackboard or slate from dictation, letters, capital and small manuscript.	Form on blackboard or slate from dictation figures up to 20; name at sight figures up to 20; add and subtract figures up to 10: orally from examples on blackboard.
Standard II (7-8 years)	One of the Narratives next in order after monosyllables in an elementary reading book used in the school.	Copy in manuscript character a line of print.	A sum in simple addition or subtraction and the multiplication Appendix.
Standard III (8-9 years)	A short paragraph from an elementary reading book used in the school.	A sentence from the same paragraph slowly read once and then dictated in single words.	A sum in any simple rule as far as short division (inclusive).
Standard IV (9-10 years)	A short paragraph from a more advanced reading book used in the school.	A sentence slowly dictated once by a few words at a time, from the same book, but not from the paragraph read.	A sum in compound rules (money)
Standard V (10-11 years)	A few lines of poetry from a more advanced reading book used in the first class of the school.	A sentence slowly dictated once by a few words at a time, from a reading book used in the first class of the school.	A sum in compound rules (common weights and measures).
Standard VI (11-12 years)	A short ordinary paragraph in a newspaper, or other modern narrative.	Another short ordinary paragraph in a newspaper or other modern narrative, slowly dictated once by a few words at a time.	A sum in practice or bills of parcels.

* Initially, ages in parentheses were not included

Appendix 4.3. Secondary subjects stipulated in the Regulations of 1904 and 1935

1904 Regulations (Paragraph 4)	1935 Grant Regulations No. 10 (Article 7)
English language	English language
English literature	English literature
One language	One language
Geography	Geography
History	History
Mathematics	Mathematics
Science	Science
Drawing	Drawing
Due provision for manual work and physical exercises (Housewifery in girls' schools)	Physical exercises and organised games
	Manual instruction for boys, dramatic subjects for girls
	Singing

Appendix 4.4. The organisation and main contents of the 1944 Act

Part I : Central Administration (Sections 1-5)	
	Replacement of the BoE by a new MoE. Replacement of the Consultative Committee by two Central Advisory Councils. Annual report by the Minister to Parliament.
Part II : Statutory System of Education (Sections 6-69)	
	County and County Borough Councils as the only LEAs responsible for all stages of education. Statutory system of education with a continuum of primary, secondary and further stages Abolition of all fees in state maintained schools and the raising of the school leaving age to 15 and its potential to 16. Schools should have a body of managers (primary) or governors (secondary) including representatives of the LEA. Categorisation of denominational schools into voluntary special agreement, controlled, and aided schools. Compulsory religious worship and instruction in all statutory schools. Ministry's responsibility for teacher training and supply by directing LEAs to involve in it. Redefinition of parental duty in terms of the child's education.
Part III : Independent Schools (Sections 70-75)	
	Statutory requirement of all independent schools' registration with the Ministry. Inspection of all independent schools by the Ministry.
Part IV : General (Sections 76-107)	
	Reorganisation of central grants for education by Ministry regulations with a more generous and equitable basis. Statutory recognition of the Burnham Committees and the salary scales for teachers agreed by them.
Part V : Supplemental (Sections 108-122)	
	Safeguards against the danger of government by regulation, and definitions of various terms used in the Act.

Source: constructed from the Act, Evans (1975: 97-103)

Appendix 4.5. Number of pupils in schools, England and Wales, 1946-1964

	1946	1950	1955	1960	1964
Maintained primary schools	3,735,680	3,955,472	4,601,862	4,202,826	4,211,370
Maintained secondary schools					
Modern	719,682	1,095,247	1,234,174	1,637,879	1,640,549
Grammar	488,931	503,008	528,455	672,881	726,075
Technical	59,918	72,449	87,366	101,913	88,501
Comprehensive	-	7,988	15,891	128,835	199,245
Other secondary	-	16,991	48,928	181,650	175,377
Total secondary	1,268,531	1,695,683	1,914,814	2,723,158	2,829,747
All schools (including nursery, independent, etc)	5,282,504	6,314,784	7,199,492	7,619,814	7,736,549

Source: DES (1980e: 4-7)

Appendix 4.6. Number of pupils in schools, England and Wales, 1965-77

	1965	1970	1974	1977
Maintained primary schools	4,283,532	4,931,702	5,049,845	4,854,112
Maintained immigrant centres	-	1,346	2,278	2,775
Maintained middle schools	-	46,241	347,697	473,720
Maintained secondary schools				
Modern	1,555,132	1,226,619	856,749	493,158
Grammar	718,705	604,916	411,195	256,040
Technical	84,587	43,700	21,144	13,673
Comprehensive	239,619	937,152	2,136,958	2,982,441
Other secondary	221,011	197,038	124,552	48,005
Total secondary	2,819,054	3,009,425	3,550,598	3,793,317
All schools (including nursery, independent, etc)	7,789,806	8,658,158	8,873,235	9,854,748

Source: DES (1980e: 4-7)

Appendix 4.7. Comparisons of traditional and progressive teaching

Traditional	Progressive
Separate subject matter	Integrated subject matter
Teacher as distributor of knowledge	Teacher as guide to educational experiences
Passive pupil role	Active pupil role
Pupils have no say in curriculum planning	Pupils participate in curriculum planning
Accent on memory, practice and rote	Learning predominantly by discovery techniques
External rewards used, e.g. grades, i.e. extrinsic motivation	External rewards and punishments not necessary, i.e. intrinsic motivation
Concerned with academic standards	Not too concerned with conventional academic standards
Regular testing	Little testing
Accent on competition	Accent on cooperative group work
Teaching confined to classroom base	Teaching not confined to classroom base
Little emphasis on creative expression	Accent on creative expression

Source: Bennett, 1976: 38

Appendix 4.8. CACE's reports on secondary education and their terms of reference

Report	Terms of reference
Early Leaving (1954)	To consider what factors influence the age at which boys and girls leave secondary schools which provide courses beyond the minimum school-leaving age; to what extent it is desirable to increase the proportion of those who remain at school, in particular the proportion of those who remain at school roughly to the age of 18; and what steps should be taken to secure such an increase (MoE, 1954: 1).
15 to 18 (1959) (Crowther Report)	To consider, in relation to the changing social and industrial needs of our society, and the needs of its individual citizens, the education of boys and girls between 15 and 18, and in particular to consider the balance at various levels of general and specialised studies between these ages and to examine the inter-relationship of the various stages of education (MoE, 1959a: XXVII).
Half Our Future (1963) (Newsom Report)	To consider the education between the ages of 13 and 16 of pupils of average or less than average ability who are or will be following full-time courses either at schools or in establishments of further education. The term education will be understood to include extra-curricular activities (MoE, 1963a: XV).

Appendix 4.9. Main features of the School Certificate and GCE examinations

School Certificate examination (1917-1951)	GCE Ordinary level examination (1951~1986)
Usually taken at age 16. Testing the results of the course of general education provided largely by grammar schools. Group (five-subject) examination. Two levels: pass and credit. Conducted by the examining bodies.	Taken at age 16 (but relaxed by Circular 289 in 1955) Designed for those in the top 20 % of pupils by ability largely in selective schools. Single-subject type of examination. Equivalent to the old credit level. Conducted by the examining bodies.
Higher School Certificate examination	GCE Advanced level examination
Taken at 18 or two years after the School Certificate. Specialisation in two main and two subsidiary subjects.	Designed for able sixth-formers pursuing two or three subjects in depth.

Appendix 4.10. Main features of the CSE examination in 1965.

Regional examining boards	Each Board, controlled by its Governing Council, had a Regional Examinations Committee, a Finance and General Purposes Committee and a Regional Subject Panel.
Three official modes of examining	Mode 1: a conventional type of examination with a syllabus constructed by the board and an examination set and marked by examiners external to the school. Mode 2: an external examination on a syllabus submitted by a school or group of schools and examined by the board. Mode 3: an examination, on a syllabus written by the school, set by the teachers themselves and marked internally by the teachers, but moderated by an examiner appointed by the regional board.
Target	The examination in four or more subjects for sixteen-year old pupils in the next 20 per cent below the top quintile and in fewer subjects for the next 20 per cent was intended.
Grade	The five grades: from Grade 1 to Grade 5. Grade 1 passes were equivalent to a GCE O-level pass.

Constructed from Whalley (1969: ch. 2, 3), Lawton (1980: 99), MoE (1963c)

Appendix 4.11. SCCE's main topics for work and its constitutional change

Main topics	The primary schools curriculum. The curriculum for the early leaver. The sixth form. English teaching. Examinations for the 16-plus age group.
Constitution (initial)	A Governing Council of up to sixty-six members. A Coordinating Committee of ten. Three curriculum committees corresponding to age groups of pupils. A GCE Committee, a CSE Committee, a General Purposes Committee, a Welsh Committee, and subject committees.
Constitutional change	The old Coordinating Committee and General Purposes Committee were replaced with the Programme Committee and Finance and Staff Committee (1968.12). The Council was granted registration as a charity (1969.1). The Council became an independent body, financed in equal parts by the DES and by the LEAs (1970.4). The Joint Examinations Sub-committee was set up (1971.6). The Central Examinations Research and Development Unit was set up (1971.9). The Dissemination Working Party was set up (1972.3). The Council was reconstituted with the Governing Council and the Programme Committee being replaced by the Convocation and the Professional committee respectively (transformed from vertical to horizontal structure) (1978)

Constructed from Lawton (1980: 70), Plaskow (1985: ix-xii), Jennings (1985: 20-21), Bell and Prescott (1975: 7)

Appendix 4.12. The organisation and main contents of the 1988 Act

Part I : Schools (Sections 1-119)
National Curriculum for all maintained schools and National Tests at 7,11 and 14. Arrangements for religious education and collective worship. New councils of NCC and SEAC. Open Enrolment requiring all maintained schools to enrol up to the limit of their physical capacity. Scheme of the Local Management of Schools. Grant Maintained Schools opting out of LEA control and funded directly by central government. Promotion of City Technology Colleges situated in an urban area.
Part II : Higher and Further Education (Sections 120-161)
Removal of a LEAs' duty to secure the provision for their area of facilities for higher education mentioned in Schedule 6. Repeal of the 1944 Act provisions for LEAs to prepare schemes for further education and to establish County Colleges. Replacement of UGC by UFC and new PCFC for funding Polytechnics and former LEA/voluntary colleges. Arrangements for finance and government of locally funded further and higher education.
Part III : Education in Inner London (Sections 162-196)
Abolition of the Inner London Education Authority by making the inner London boroughs as individual LEAs.
Part IV : Miscellaneous and General (Sections 197-238)
Education Assets Board to deal with the transfer of assets as a result of the changes in ownership and control. University Commissioners for the work on academic tenure. Unrecognised degrees, extension of functions of the Audit Commission, etc.

Source: 1988 Act; Maclure (1988)

Appendix 4.13. The main structure and content of the National Curriculum.

Main structure	Content	Application
Basic curriculum	This comprises religious education for all registered pupils and the National Curriculum for pupils at the school of compulsory school age.	Maintained schools
10 foundation subjects		
Core (3)	Mathematics, English and science. (Welsh added to Welsh-speaking schools in Wales)	Key stages 1-4.
Other foundation (7)	History, geography, technology (including design), music, art and physical education.	Key stages 1-4.
	Modern foreign language. (Welsh in not Welsh-speaking schools in Wales)	Key stages 3-4.
4 key stages	These are the periods in each pupil's education to which the elements of the National Curriculum apply, and normally related to the age of the majority of pupils in a teaching group: key stage 1 (age 5-6: Y1-2), key stage 2 (age 7-10: Y3-6), key stage 3 (age 11-14: Y7-9), key stage 4 (age 15-16: Y10-11).	
Attainment targets	The knowledge, skills and understanding which pupils of different abilities and maturities are expected to have by the end of each key stage.	
Programmes of study	The matters, skills and processes which are required to be taught to pupils of different abilities and maturities during each key stage.	
Assessment arrangements	The arrangements for assessing pupils at or near the end of each key stage for the purpose of ascertaining what they have achieved in relation to the attainment targets for that stage.	

Source: constructed from Sections 2-3 of the 1988 Act, DES (1989d)

Appendix 4.14. Timetable for implementing foundation subjects

			KS1	KS2	KS3	KS4
Mathematics and Science	Introduction	Autumn	1989	1990	1989	1992
	First reported assessment	Summer	1992	1995	1993	1994
English	Introduction	Autumn	1989	1990	1990	1992
	First reported assessment	Summer	1992	1995	1994	1994
Technology	Introduction	Autumn	1990	1990	1990	1993
	First reported assessment	Summer	1993	1995	1994	1995
History and Geography	Introduction	Autumn	1991	1991	1991	1994
	First reported assessment	Summer	1994	1996	1995	1996
Art, Music and PE	Introduction	Autumn	1992	1992	1992	1995
	First reported assessment	Summer	1995	1997	1996	1997
Modern Languages	Introduction	Autumn			1992	1995
	First reported assessment	Summer			1996	1997

Source: NCC (1990a: 14)

Appendix 4.15. Main features of TVEI, YTS and CPVE

TVEI	Announced in November 1982 and introduced in September 1983. Aimed to provide full-time students aged 14-18 a four year course combining general with technical and vocational education with collaboration between schools, colleges and employer organisations. Devised and run by the Manpower Services Commission (MSC).
YTS	Initiated in April 1983 and became fully operational in September 1983, replacing the YOP. Aimed to equip all 16-17-year-olds in unemployment to adapt successfully to the demands of employment by subsidising training for a maximum of one year which was increased in April 1986 to two years. Had the flexibility with a range of 'modes' of operation allowing different forms of control over the individual's programme and different components of 'on-the-job' and 'off-the-job' training. Replaced in 1989 by Youth Training (YT), guaranteeing a place to all 16-18-year-olds in unemployment, along with more flexibility in its length and nature (in March 1990, 344,999 youths were on the scheme). Devised and run by the Manpower Services Commission (MSC).
CPVE	Proposed in May 1982 (DES, 1982g) and launched in 1983, with the single subject model of CEE being rejected. Aimed to provide a programme leading to qualifications for lower achievers who stayed on in school or college post-16. Had a mixture of academic, vocational preparation and life skill courses, along with work experience. Administered by a Joint Board of the City and Guilds of London Institute (CGLI) and the Business and Technician Education Council (BTEC), with some representatives from other main examining bodies, employers and LEAs.

Source: constructed from DE (1981), DES (1982g, 1985a, 1991b), Dolton (1993), Dolton et al. (1994), Lumby and Foskett (2005).

Appendix 4.16. Value positions between traditional and progressive vocational education

Traditional Vocational	Progressive Vocational
Subject-Centred	Student Centred
Job Specific	Personal Competence/effectiveness
Employers' needs important	Working with others
Increasing specialisation	Breadth and Balance
Didactic teaching	Inter-disciplinary
Skill based	Preparation for adult life including employment
Body of knowledge	Experiential learning
Problems set with known solutions	Open-ended problems
Teacher as subject expert	Teacher as facilitator
Teacher makes decisions	Student shares decision-making

Source: Hodkinson (1991: 28)

Appendix 4.17. The national qualification framework with three tracks, the mid-1990s.

Age	Academic	GNVQ	NVQ	
			Description	Level
18+			Professional Qualifications. Middle management	5
	Degree	GNVQ Level 4	Higher Technician. Junior Management	4
16+	A/AS Level	GNVQ Advanced	Technician. Advanced Craft Supervisor	3
	GCSE (grade C or above)	GNVQ Intermediate	Basic Craft Certificate	2
	GCSE (below grade C)	GNVQ Foundation	Semi-skilled	1
5-16	National Curriculum. Programmes beginning from Key Stage 4: Young Enterprise (YE), Youth Award Scheme (YAS); Part One GNVQ, CGLI Technological Baccalaureate; NVQ I, RSA.			

Source: constructed from DES/DE (1991: 18), Hodkinson and Mattinson (1994:325), Pring (1995: 71).

Appendix 4.18. Main school diversity programmes established by New Labour

Education Action Zones (EAZs) (DfEE, 1997a; 1997c) (Ofsted, 2003c)	<p>Each EAZ is a partnership between a group of the schools, their LEA, businesses from the community and others, governed by their Education Action Forum, aiming to encourage innovative approaches to tackling problems of underachievement and social exclusion in disadvantaged areas.</p> <p>25 first-round EAZs, allocated via a process of competitive bidding, were introduced between September 1998 and January 1999, and a further 47 second-round zones started in September 2000.</p> <p>EAZs receive government funding up to £750,000 per annum for 3-5 years and are expected to raise at least £250,000 a year, in cash or in kind, from private sector sponsors.</p> <p>In 2003, each EAZ started to be transformed into an Excellence Cluster or become a zone within the EiC scheme.</p>
Excellence in Cities (EiC) (DfES, 2005c) (DCSF, 2008a) (Ofsted, 2003c)	<p>EiC was launched in 1999 as a three-year initial programme to raise educational standards and promote social inclusion in major cities and in areas that face similar problems to those faced by the inner cities.</p> <p>In its first phase, the EiC involved 25 LEAs and over 438 secondary schools and has been extended into primary schools in some EiC areas, into small groups of schools affected by pockets of deprivation (through Excellence Clusters), and into post-16 provision (through Excellence Challenge).</p> <p>The EiC partnerships are set up following DfES identification of LEA areas that are eligible to join the programme, with the funding based on a formula going directly to the designated LEAs once partnership plans are approved.</p> <p>The EiC programme consists of 7 key strands: Gifted and Talented; Learning Mentors; Learning Support Units; City Learning Centres; Beacon schools; and EiC Action Zones.</p> <p>The EiC which has involved 1300 secondary and 3600 primary schools nationwide ceased to be a centrally discreet, funded programme in April 2006, with all EiC funding being paid through local authorities to schools as part of their overall School Development Grant (SDG).</p>
Academies (DfES, 2003b; 2003c) (DfES, 2005d; 2006a) (DCSF, 2007a; 2008b)	<p>The Academies initiative was launched in March 2000 as part of the Transforming Secondary Education agenda and the first three Academies were opened in September 2002.</p> <p>Academies are state-funded independent schools generally located in areas of socio-economic disadvantage (initially, they were limited to inner city areas but since the 2002 Education Act they could be established also in challenging suburban and rural areas).</p> <p>Academies are set up as charitable companies limited by guarantee by a wide range of sponsors including educational foundations, universities, business, private school trusts, and faith communities, and are all-ability schools, usually for 11 to 16 or 11 to 18 year olds, although some provide education for pupils both the primary and secondary phases.</p> <p>Each Academy is governed by a governing body, constituted under its Memorandum and Articles and generally chaired by its sponsor, as the Trust, which employs its staff.</p> <p>Like maintained schools with a specialism, academies may select up to 10 per cent of pupils on the basis of an aptitude for some specialisms.</p> <p>In most circumstances, sponsors provide a contribution of 10 %, up to a cap of £2 million towards the costs of the new or refurbished building, and recurrent costs are funded directly by the Department.</p> <p>The government has indicated its commitment to establishing 400 Academies, with at least 200 open or in the pipeline by 2010.</p>
Beacon Schools (NFER, 2004a) (DCSF, 2008c)	<p>Beacon Schools are all kinds and phases of high-performing state maintained schools identified by Ofsted's inspections and reports and receive on average an additional £38,000 per year for normally three years from the Department to be centres of excellence, building partnerships, sharing effective practice and offering advice to other schools.</p> <p>It was launched with the first 75 pilot Beacon Schools in September 1998, and reached a peak of around 1150 in number by September 2002.</p> <p>Funding for Beacon Schools ceased in 2004 or 2005, depending on existing contracts. Instead, the Leading Edge Partnership programme and Primary Strategy Learning Networks were established for secondary schools and primary schools respectively.</p>
Federations (DCSF, 2008d)	<p>Federations, envisaged in the Education Act 2002, describes a group of two or more schools who have a formal agreement to share governance arrangements, and who work together to raise standards.</p> <p>Under the 2002 Act, only maintained schools could form a 'hard governance federation' or a 'soft governance federation' but new Collaboration Regulations issued in May 2007 following the Education and Inspection Act 2006 permitted maintained schools to establish a soft governance federation with FE colleges while any type of school can work in a 'soft federation' with other partners, including FE institutions, independent schools, Academies and CTCs.</p>
Leading Edge Partnership (LEP) (DfES et al., 2007) (DCSF, 2008e, 2008f)	<p>The first Leading Edge Partnerships were launched in July 2003 replacing the previous Beacon School programme, formed from some 700 schools in 103 partnerships.</p> <p>This programme is designed to enable groups of schools to work together to improve pupil outcomes at key stages 3 and 4, particularly amongst the lowest attaining pupils in the partnership, and is managed on behalf of the Department by the Specialist Schools and Academies Trust (SSAT).</p> <p>Currently, the LEP programme has some 212 partnerships in all, receiving annual funding in excess of £12m.</p>
Diversity Pathfinders (DfES, 2001a; 2006h) (DCSF, 2008k)	<p>The programme is designed to develop and demonstrate the benefits of greater secondary specialisation and diversity by establishing a small number of areas to act as pathfinders for the policy.</p>

	It was implemented in January 2002 by six LEAs which set up their own plans with DfES/LEA funding to encourage groups of secondary schools to collaborate and to diversify and develop as specialist schools, and was run until April 2005.
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Appendix 4.19. Key changes made by the 2006 Primary Framework

Literacy	Mathematics
Learning objectives organised under twelve strands. Explicit inclusion of speaking and listening objectives. Stronger emphasis on building learning over time and developing the teaching sequence. Adjustment of expectations particularly around the learning and teaching of phonics. Closer focus on assessment for learning during, as well as at the end of, units of work. Reordering of the strands and separation of word reading from word comprehension. Greater signposting of Early Reading.	Learning objectives organised under 7 strands. Medium term planning model with units of work of 2 or 3 weeks to secure learning. Mental calculation given higher status and progression in written calculation is clarified. Adjustment of expectations particularly in lower Key Stage 2. Using and applying mathematics receives a higher profile. Sharper assessment tools throughout the learning process. Restructuring of the issue of standard written methods of calculation. Greater clarity in the use of calculators.

Source: DfES (2006d: slide 14, 16)

Appendix 4.20. The advanced level curriculum before and after Curriculum 2000

Features of breadth	Old advanced level curriculum	Curriculum 2000
Volume of study	Low in comparison with European competitors	Nearer to European competitors
Number of subjects	Between 2 and 3	Between 3 and 4
Spread of subjects	Minority contrasting, mostly complementary	Minority contrasting, mostly complementary
Mixing academic and vocational study	Small minority	Significantly minority
Key skills	Primarily offered to students on vocational programmes	Offered to about half of all advanced-level learners
General studies	Most common form of breadth and involving a significant minority of institutions	Second most popular form of breadth and involving a significant minority of institutions
Enrichment/extracurricular activities	Very important in a minority of institutions	Sharply declining role in most institutions
Learning style and assessment	Diverse, with a combination of linear and modular syllabuses and internal and external assessment across a range of awards	More standardised, with modular delivery and more external assessment across all awards

Source: Hodgson et al. (2004: 448)

Appendix 5.1. The supply of certificated teachers, 1847-1859

Year	As students		As acting teachers		Annual total		Cumulative total		Number in charge of schools	
	Males	Female	Males	Female	Males	Female	Males	Female	Males	Female
1847	31	5	102	4	133	9	133	9	120	4
1848	52	19	353	72	405	91	538	100	501	93
1849	98	73	204	100	302	173	840	273	703	227
1850	111	93	146	84	257	177	1,097	450	818	275
1851	172	107	150	100	322	207	1,419	657	966	401
1852	404	145	224	109	628	254	2,047	911	1,352	627
1853	249	275	291	172	540	447	2,587	1,358	1,541	756
1854	538	370	201	109	739	479	3,326	1,837	1,859	977
1855	439	342	221	164	660	506	3,986	2,343	2,242	1,190
1856	438	351	220	155	658	506	4,644	2,849	2,726	1,647
1857	490	544	160	157	650	701	5,294	3,550	3,206	1,960
1858	810	704	288	102	1,098	806	6,392	4,356	3,568	2,320
1859	806	757	145	148	951	905	7,343	5,261	4,237	2,762

Source: NC (1861: 638, 676)

Appendix 5.2. Development of elementary education in England and Wales between 1870 and 1895

Year	Number of schools		Average attendance		Expenditure on public education	
	Voluntary schools	Board schools	Voluntary schools	Board schools	From voluntary subscriptions	By central authorities
1871	8,978	-	1,231,434	-	£437,401	£919,132
1895	14,479	5,260	2,445,812	1,879,218	£836,428	£6,794,614

	Certificated Teachers		Assistant Teachers		Pupil Teachers		Additional Teachers	Total (Female)
	Male	Female	Male	Female	Male	Female	Female	
1870	6,395	6,072	487	775	6,384	8,228	-	28,341 (15,075)
1895	21,223	31,718	5,047	22,914	7,246	26,757	11,678	126,583 (93,067)

Source: Tropp (1957: 113-114)

Appendix 5.3. Teachers in public schools and parental status in the nineteenth century

Status of father		Number of school teachers employed at					Totals
		Eton	Harrow	Shrewsbury	Rugby	St Paul's	
Titled, gentry, men of property, etc.		9	20	7	23	13	72
Professional class							
	Administration – Governmental, Empire, regional, officers of armed forces	5	6	4	5	1	21
	Churchmen	34	26	25	41	16	142
	Scholastic: university and headmasters and assistants in grammar and public schools	5	15	3	10	7	40
	The law, medicine and other professions	7	6	5	6	7	31
Middle and lower classes		9	9	9	7	8	42
Overseas		0	6	3	2	6	17
Unknown parental background		20	20	14	33	22	109
Totals		89	108	70	127	80	474

Source: Bamford (1973: 30) * Eton appointments: 1800-1861, others: 1800-1899

Appendix 5.4. Development of secondary education in England and Wales, 1914-1938

Year	Number of grant-aided secondary schools	Number of pupils	Number of free places	Percentage of all pupils
1914	1,027	187,647	63,274	33.8
1920	1,141	307,862	93,458	30.3
1924	1,270	349,141	126,219	36.2
1928	1,329	377,540	159,595	42.3
1932	1,379	432,061	207,951	48.1
1936	1,389	463,906	214,714	46.2
1938	1,398	470,003	215,125	45.8

Year	Number of teachers			Percentage of graduates			Percentage of trained teachers *		
	Men	Women	Total	Men	Women	Total	Men	Women	Total
1913	5,246	5,158	10,404	70.9	52.7	61.9	37.5	47.4	42.4
1925	9,210	9,859	19,069	78.3	60.2	69.0	46.4	59.6	53.0
1927	9,572	9,682	19,254	79.1	61.5	70.3	46.3	45.0	45.7
1929	10,249	10,265	20,514	82.4	64.7	73.5	48.8	48.1	48.5
1932	11,286	11,007	22,293	84.3	66.7	75.7	52.4	53.5	53.0
1935	12,050	11,375	23,425	86.0	68.6	77.6	55.1	58.4	56.6
1936	12,401	11,602	24,003	86.5	68.9	78.0	56.0	59.9	57.8
1937	12,679	11,772	24,451	86.8	68.8	78.1	57.1	61.2	59.1

Source: Simon (1974: 363-364), Gosden (1972: 215), BoE (1938: 103) * the term 'trained' has been used in a more restricted sense from 1927 than previously.

Appendix 5.5. Development of elementary education in England and Wales, 1920-38

Year	Average number of pupils on registers	Average attendance	Number of teachers	Pupil-teacher ratio
1920-21	5,933,458	5,215,742	165,069	31.6
1923-24	5,670,052	5,031,680	159,759	31.5
1926-27	5,635,412	4,973,656	162,242	30.7
1929-30	5,546,002	4,940,831	168,038	29.4
1932-33	5,635,216	5,049,284	170,579	29.6
1935-36	5,321,065	4,748,453	169,591	28.0
1937-38	5,087,485	4,526,701	166,674	27.2

Year	Grade of Teacher						
	Certificated		Uncertificated		Supplementary		Total
1921	118,071	71.5	35,178	21.2	12,898	7.3	166,147
1931	126,245	77.0	30,632	18.6	7,270	4.4	164,147
1938	131,941	81.9	24,058	14.9	4,905	3.2	160,904

Source: Simon (1974: 369); Gosden (1972: 280)

Appendix 5.6. Salary Scales of 1920 for elementary and secondary schoolteachers

Scales for elementary schoolteachers																								
Standard Scale	College-trained certificated assistant teachers						Uncertificated assistant teachers																	
	Men					Women				Men				Women										
	£	s.	£	s.	£	£	£	s.	£	£	s.	£*	£**	£	£	s.	£*	£**						
I	172	10	×	12	10	325	160	×	12	10	260	103	10	×	7	10	160	204	96	×	7	10	150	164
II	172	10	×	12	10	340	160	×	12	10	272	103	10	×	7	10	160	204	96	×	7	10	150	164
III	182	10	×	12	10	380	170	×	12	10	304	109	10	×	7	10	180	228	102	×	7	10	160	182
IV	200		×	12	10	425	187	×	12	10	340	120		×	7	10	200	255	112	×	7	10	170	204
Scales for assistant masters and mistresses in secondary schools																								
	Graduates						Non-Graduates																	
	Men					Women				Men				Women										
	£					£				£ s.				£ s.										
Minimum	250					225				190				177 10s.										
Increment	15					15				12 10				12 10s.										
Maximum	500					400				400				320										

Source: BoE (1920b: 2, 4; 1921b: 3)

Appendix 5.7. Changes in the main categories of recognition for teachers

Pre-1944		Post-1944	
Public elementary schools	Certificated teacher	Maintained primary and secondary schools	Qualified teacher
	Uncertificated teacher		Temporary teacher
	Supplementary teacher		Occasional teacher
	Pupil/Student teacher		
Grant-aided secondary schools	Non-existence of a statutory certification system: graduates/non-graduates, trained/untrained		(from September 1968) Qualified teacher Student teacher Instructor
Independent schools	No statutory certification system	Independent schools	No statutory certification system

Source: constructed from DES (1973c: xii-xiii)

Appendix 5.8. Teachers in maintained primary and secondary schools, 1950 to 1978

		1950	1954	1960	1965	1970	1975	1978
Primary (women)		130,412 94,594	143,133 103,521	143,507 106,741	138,171 102,151	165,257 122,303	204,247 155,864	202,199 153,982
Secondary								
	Modern	42,269	50,298	72,907	72,658	51,291	31,750	21,676
	Grammar	27,233	28,476	34,333	39,079	28,689	17,061	11,880
	Technical	3,370	4,044	5,254	4,665	1,473	819	692
	Comprehensive				11,317	93,002	167,838	195,811
	Other secondary			7,651	10,388	8,807	3,392	2,593
	Unattached and visiting		4,048			10,641	4,043	3,320
	Miscellaneous			3,478	2,354	796	1,346	1,678
Divided service			1,211	421	5,318	2,303	1,053	1,000
Total (women)		207,668 129,744	231,210 142,631	267,551 160,729	283,950 162,351	328,174 191,358	419,999 250,794	438,871 258,811
Qualified teachers								
Graduates	Trained	25,563	30,642	38,101	42,463	65,893	93,149	110,235
	Untrained	7,435	8,138	13,921	16,357	20,959	22,894	21,902
	Total	32,998	38,780	52,022	58,820	86,852	116,043	132,137
Graduate equivalents	Trained	118	1,007	2,395	3,612	5,471	6,657	7,108
	Untrained	844	1,034	1,613	2,038	1,925	2,045	1,847
	Total	962	2,041	4,008	5,650	7,396	8,702	8,955
Other qualified teachers	Trained	142,548	166,767	187,384	197,471	278,967	297,871	288,753
	Untrained	23,276	18,878	17,801	15,047	12,002	10,344	9,026
	Total	165,824	185,645	205,185	212,518	290,969	308,215	297,779
Non-qualified teachers		7,884	4,744	6,336	6,962	-	-	-
All teachers	Trained	168,229	198,416	227,880	243,546	350,331	397,677	406,096
	(women)	101,551	120,550	138,130	141,643	212,648	242,374	244,738
	Untrained	39,439	32,794	39,671	40,404	34,886	35,283	32,775
	(women)	28,193	22,081	22,599	20,708	15,583	15,343	14,073
proportion		81.0:19.0	85.8:14.2	85.2:14.8	85.8:14.2	90.9:9.1	91.9:8.1	92.5:7.5

Source: MoE (1962c; 1963d); DES (1966d; 1968; 1969; 1970d; 1971b; 1980f)

Appendix 5.9. Major features of Burnham Reports, 1948-70

Date of Report	Basic salary scale for a QT	Graduate addition	'Good Honours' payment	Training additions	Allowances for posts of special responsibility	Payments for head teachers
1948	£300 to £555	£30	£15 for Class 1 degree increasing to £30 at the scale maximum	£15 for each year of training beyond 2 up to a maximum of 5 years	To be paid on 12.5 to 17.5 % of full-time posts under each authority and to range from £50 to £150	Additional to total payments under columns 1 to 4 until 1965: school groups based on pupil unit totals (for each pupil under 15 count 1 unit, 15 to 16 4 units, 16 to 17 7 units, 17+ 10 units) 22 groups with allowances from £55 for the smallest unit totals to £900 for the largest
1951	£375 to £630	£60	-	£18 "	Number and range to depend on the pupil unit total of a school: minimum payment for an individual teacher fixed at £40	As in 1948 Report
1952	Special cost of living addition of £40 p.a. to all salaries					
1954	£450 to £725	£60	£30 for all 'good honours'	£18 "	As in 1951 Report	Allowances for the 22 groups increased to range from £100 for smallest to £920 for the largest
1956	£475 to £900	£75	£50	£25 "	New scheme of (1) Head of Department posts, ranging from A (£125) to D (£350); (2) Graded posts, scaled as I (£75), II (£125) and III (£175)	Unit scores changed to each pupil under 13 1 unit, 13 to 15 2 units 15 to 16 4 units, 16 to 17 6 units, 17 and over 10 units. Allowances to range from £125 to £1,115 for the 22 groups
1959	£520 to £1,000	£90	£75	£30 for each year of training beyond 2 up to a maximum of 6 years	(1) Head Department posts to range from A (£150) to D (£420); (2) Graded posts from I (£90) to III (£210)	27 groups (5 added to cover heads of largest schools) Allowances to range from £150 to £1,485
1961	£570 to £1,170	£100	£100	Up to a maximum of 4 increments	(1) Head Department posts to raise from A (£165) to E (£545); (2) Graded posts from I (£100) to III (£230)	27 groups ranging from £165 to £1,670
1963	£630 to £1,250	£100	£120	Up to a maximum of 3 increments for each year of training beyond 3 years	(1) Head Department posts to range from A (£180) to E (£590); (2) Graded posts from I (£110) to III (£250)	27 groups ranging from £180 to £1,770
1965	£730 to £1,400	£100	£120	Up to a maximum of 3 increments: £50 allowance for post-graduate certificate, etc.	(1) Head Department posts to range from A (£200) to E (£660); (2) Graded posts from I (£120) to III (£300)	11 separate salary scales for heads introduced; 13 scales depending on school unit totals with maxima ranging from £1,600 to £3,850
1967	£800 to £1,500	£100	£120	Up to a maximum of 3 increments: £50 allowance for post-graduate certificate, etc.	(1) Head Department posts to range from A (£210) to E (£700); (2) Graded posts from I (£125) to III (£315)	13 scales with revised maxima ranging from £1,710 to £4,110
1969	£860 to £1,600	£105	£125	A maximum of up to £3 increments; £50 allowance for post-graduate certificate, etc.	(1) Head Department posts to range from A (£222) to E (£742); (2) Graded posts from I (£132) to III (£334)	14 scales with revised maxima ranging from £1,817 to £4,583
1970	£980 to £1,720 (special cost of living addition of £120 p.a. to all salaries)					

Source: Gosden (1972: 92-93)

Appendix 5.10. In-service training courses and attendance in 1966/67

Length of course	LEA		Institutes of education and university departments		Colleges of education		Others (including DES)		Total	
	course	attendance	Course	attendance	course	attendance	course	attendance	course	attendance
Very long courses (6 weeks and over)	162	3,913	125	2,393	157	1,701	31	583	475	8,590
Long courses (less than 6 weeks)	217	4,417	36	1,039	12	228	6	141	271	5,825
Medium courses (less than 3 weeks)	634	16,935	142	4,128	75	1,965	221	10,819	1,072	33,847
Short courses (less than one week)	2,695	89,532	573	21,983	88	3,092	225	17,881	3,581	132,488
Very short courses (one day or less)	1,702	70,766	406	22,106	31	1,409	276	18,423	2,415	112,704
Total	5,410	185,563	1,282	51,649	363	8,395	759	47,847	7,814	293,454

Source: DES (1970b: 12)

Appendix 5.11. Teachers in maintained primary and secondary schools, 1980-1996

	1980	1982	1984	1986	1988	1990	1992	1994	1996
Nursery (women)	1732 1726	1706 1695	1699 1687	1667 1654	1645 1624	1614 1590	1,607 1,572	1,558 1,522	1,510 1,460
Primary									
Grant-maintained	-	-	-	-	-	-	118	2,670	4,800
LEA-maintained	195,495	181,324	175,543	169,731	174,559	177,124	177,187	176,618	175,220
All primary schools (women)	195,495 150,409	181,324 139,513	175,543 133,695	169,731 133,163	174,559 138,850	177,124 142,529	177,305 143,805	179,288 146,542	180,020 148,240
Secondary									
Grant-maintained	-	-	-	-	-	805	5,733	27,180	33,140
LEA-maintained	245,981	243,743	240,909	229,168	218,930	203,934	190,030	160,401	153,590
All secondary schools (women)	245,981 110,654	243,743 110,399	240,909 110,228	229,168 106,246	218,930 102,719	203,934 974,67	195,763 95,731	187,581 94,329	186,740 95,970
Divided service	1,332	1,418	1,660	1,934	2,294	2,332	2,121	1,939	1,930
Miscellaneous	358	417	380	363	220	168	156	148	100
Total (women)	444,898 263,758	428,608 252,685	417,191 246,836	402,863 242,464	397,648 244,747	385,177 243,134	376,952 242,534	370,514 243,768	370,280 247,040
Qualified teachers									
Graduates	Trained	132,854	147,289	161,210	167,514	174,172	180,233	188,082	199,736
	Untrained	21,113	20,430	19,486	17,877	17,055	15,306	13,695	11,330
	Total	153,967	167,719	180,696	185,391	191,227	195,539	201,777	211,066
Graduate equivalent	Trained	6,871	6,816	6,825	8,196	7,069	6,220	5,451	4,763
	Untrained	1,716	1,642	1,485	1,447	1,558	1,236	1,046	873
	Total	8,587	8,458	8,310	9,643	8,627	7,456	6,497	5,636
Other qualified teachers	Trained	247,396	245,656	222,408	203,080	193,357	177,813	163,487	148,842
	Untrained	7,948	6,775	5,777	4,749	4,437	4,369	5,191	4,970
	Total	282,344	252,431	228,185	207,829	197,794	182,182	168,678	153,812
All teachers	Trained (women)	414,121	399,761	390,443	378,790	374,598	364,266	357,020	353,341
	Untrained (women)	250,440	240,340	235,244	231,707	233,825	232,694	231,948	234,162
	Untrained (women)	30,777	28,847	26,748	24,073	23,050	20,911	19,932	17,173
	Proportion	13,318	12,345	11,592	10,757	10,922	10,440	10,586	9,606
		93.1:6.9	93.3:6.7	93.6:6.4	94.0:6.0	94.2:5.8	94.6:5.4	94.7:5.3	95.4:4.6

Source: DES (1991f: 7, 9), DfEE (1996d: 12, 14; 1998c: 30, 31)

Appendix 5.12. Trends in the teaching profession under the New Right policies

From	To
Profession	Professional
Knowledge	Skill
Education	Training
Effectiveness	Efficiency
Conception	Delivery
Status	Contract
Clients	Consumers
Influence	Compliance
Responsibility	Accountability
Leadership	Management

Source: Hoyle (1995: 60)

Appendix 5.13. Main features of salary structure in Blue Books, 1987-97

Date of Book		Main scale for a QT	Incentive allowance	Head teacher	Deputy head teacher
1987		£7,599 to £13,299	£501 to £4,200	£15,501 to £30,501	£14,751 to £22,251
		Single main scale with 11 scale points	Incentive allowance with five rates from A to E for teachers other than deputies and heads	14 ordinary school groups based on pupil unit totals (for each pupil under 14 count 2 units, 14 to 15 4 units, 15 to 16 5 units, 16 to 17 7 units, 17+ 9 units)	Lowest annual salary applied to teachers in ordinary school groups below 4
1988		£7,920 to £13,863	£801 to £4,401	£16,158 to £31,794	£15,375 to £23,193
1989		£8,394 to £14,694	£858 to £4,710	£17,370 to £34,179	£16,527 to £24,933
1990	A	£9,000 to £15,723	£927 to £5,088	£18,588 to £36,573	£17,685 to £26,679
	B	£9,000 to £16,002	£927 to £5,502	£18,300 to £40,002	
		The main scale was renamed the standard scale with 11 scale points		A new common pay spine with 49 points for deputy/head teachers. 6 ordinary school groups from 14. Deputy head teachers in 6 groups paid between 22 and 32 points.	
1991	A	£10,212 to £17,208	£927 to £5,502	£19,674 to £44,505	
	B	£10,404 to £17,523	£1,206 to 7,155	£20,634 to £46,680	
		Standard scale with 10 scale points. Local scale points could be added to the scale up to a certain maximum		Pay spine with 51 points. Deputy head teachers in 6 groups paid between 22 and 34 points.	
1992		£11,184 to £18,837	£1,296 to £7,692	£22,182 to £50,181	
1993		£11,244 to £30,441		£22,404 to £50,682	
		A new integrated pay spine with 18 spine points (0-17). Provision for excellent points.			
1994		£11,571 to £31,323		£23,055 to £52,152	
1995		£11,883 to £32,169		£23,676 to £53,559	
1996	A	£12,342 to £33,054		£24,327 to £55,032	
	B	£12,462 to £33,375		£24,564 to £55,566	
		Half spine points introduced to the existing pay spine			
1997	A	£12,711 to £34,044		£25,056 to £56,676	
	B	£12,873 to £34,476		£25,374 to £57,399	

Source: constructed from related-year Blue Books

Appendix 5.14. Main content of the Regulations and Circular 12/91

Appraising body	The appraising body is responsible for all the aspects of appraisal set out in the Regulations. The LEA is the appraising body for county, voluntary controlled, voluntary aided, special agreement and maintained special schools; the governing body is the appraising body for grant-maintained schools.
Scope of teachers	The Regulations apply to all qualified teachers, including heads, employed on contracts of at least one year's duration to work full-time, or at least 40% of full-time, at a single LEA maintained or grant-maintained school. The Regulations do not apply to articulated teachers, licensed teachers, other unqualified teachers, supply teachers, probationary teachers, teachers working less than 40% of full-time, advisory and specialist/peripatetic teachers or teachers in non-maintained special schools.
Appraisal cycle	Each school teacher should be appraised on a two-year cycle.
Work to be appraised (Criteria)	The appraiser is entitled to appraise performance across the full range of professional duties undertaken, including temporary responsibilities, but appraisal should be set clearly within the context of the professional duties as set out in the School Teachers' Pay and Conditions Document, the appraisee's own work and job description and also should take account of the policies of the school and the school development plan.
Selection of appraisers	Two appraisers should be appointed for the head of each county, controlled or special agreement school by the LEA; for the head of a voluntary aided school by the agreement between the LEA and the governing body; for the head of a grant-maintained school by the governing body. It is recommended that LEAs delegate decisions on the selection of the appraisers of head teachers in schools they maintain to the Chief Education Officer (CEO). The responsibility for selecting the appraisers of school teachers and deputies lies with the head teacher and appraisers should, in most circumstances, be responsible for no more than about 4 appraisees.
Appraisal methods	The compulsory components of appraisal: classroom observation (task and/or classroom observation for heads); an appraisal interview, in which targets for action are established; the preparation of an appraisal statement; and follow up, including a review meeting between the appraiser and appraisee. The components such as an initial meeting between the appraiser and the appraisee which is compulsory for heads, self-appraisal by the appraisee, and collection of data from sources other than classroom observation may be included in the appraisal process.

Source: constructed from the 1991 Regulations and Circular 12/91

Appendix 5.15. Full-time equivalent teachers in maintained schools by type of contract, 1997-2008

	1997	2000	2002	2004	2006	2008
Nursery and primary						
Qualified regular teachers	190,700	191,600	193,100	190,400	192,000	192,900
Full-time	175,800	174,700	173,900	168,700	166,700	165,200
Part-time	14,800	16,800	19,100	21,800	25,300	27,600
Teachers without QTS	1,000	1,500	4,300	6,200	6,200	5,200
Instructors and OTTs	800	1,200	2,900	3,900	3,900	3,300
On EBRs to QTS	200	300	1,300	2,300	2,300	1,900
In occasional service	8,300	10,500	10,100	8,000	7,400	7,400
Total teachers	200,000	203,600	207,500	204,600	205,600	205,500
All regular teachers	191,700	193,100	197,400	196,600	198,200	198,100
Secondary						
Qualified regular teachers	187,700	191,100	196,600	200,600	205,900	205,000
Full-time	174,200	176,500	181,200	183,900	187,500	185,500
Part-time	13,400	14,500	15,300	16,700	18,300	19,500
Teachers without QTS	1,800	2,100	6,600	10,400	10,400	10,200
Instructors and OTTs	1,500	1,800	4,700	6,900	6,800	6,800
On EBRs to QTS	300	300	1,900	3,600	3,600	3,400
In occasional service	4,400	5,300	6,400	5,500	4,600	4,600
Total teachers	193,800	198,500	209,600	216,500	220,900	219,900
All regular teachers	189,400	193,200	203,200	211,000	216,300	215,300
*Total						
Qualified regular teachers	396,200	400,800	408,200	410,000	417,600	418,100
Full-time	366,000	367,200	371,100	368,900	371,000	367,700
Part-time	30,000	33,400	36,900	41,100	46,700	50,400
Teachers without QTS	2,900	3,800	11,500	17,600	17,900	16,800
Instructors and OTTs	2,500	3,200	8,100	11,600	11,800	11,200
On EBRs to QTS	500	600	3,300	6,000	6,100	5,500
In occasional service	13,600	16,700	17,500	14,500	12,900	12,800
Total teachers	412,800	421,300	437,100	442,100	448,400	447,600
All regular teachers	399,200	404,600	419,600	427,700	435,600	434,900

Source: DCSF (2008n: table 2) *including special schools, PRUs and education elsewhere.

Appendix 5.16. Main features of pay structure in Blue Books, 1998-2008

Date of Book		Classroom teachers	Allowance	Post-threshold teachers	Advanced skills teachers	Heads and deputies (Leadership group)
1998	A	£13,131 to £35,166			£25,200 to £40,200	£25,881 to £58,548
	B	£13,362 to £35,787				£26,337 to £59,580
					New pay scale with 27 spine points for Advanced skills teachers introduced	
1999	A	£14,658 to £37,041			£26,082 to £41,607	£31,155 to £70,002
	B					£27,258 to £61,665
		Spine points 0 and 0.5 removed				New pay spine (A) with 34 points. 8 ordinary school groups for heads (excluding deputies) from 6 groups based on pupil unit totals (for each pupil at key stages 1-2, 7 units; key stage 3, 9; key stage 4, 11; key stage 5, 13 units).
2000	A	£15,141 to £23,958	Management allowance (MA) with 5 levels (£1,485 to £9,573). Recruitment and retention allowance (RA) with 4 levels (£909 to £3,765). Special educational needs allowance (SA) with 2 levels (£1,515, £3,000)	£25,959 to £30,018	£26,943 to £42,981	£32,184 to £72,312
	B					£28,446 to £75,972
		New pay scale with 9 scale points introduced		Pay scale for post-threshold teacher with 5 scale points introduced		New pay spine (B) for the leadership group (heads, deputies, assistant heads) with 41 spine points (L1-L41) introduced. Spine A for assimilation of heads' pay to pay spine B.
2001		£16,038 to £24,843	MA (£1,539 to £9,927), RA with 5 levels (£942 to £5,085), SA (£1,572 to £3,111)	£26,919 to £31,128	£27,939 to £44,571	£29,499 to £78,783
2002	A	£16,599 to £25,713	MA (£1,593 to £10,275), RA (£975 to £5,262), SA (£1,626 to £3,219)	£27,861 to £32,217	£28,917 to £46,131	£30,531 to £81,540
	B	£17,595 to £25,713				
		New pay scale (B) with 6 scale points (M1-M6) introduced from Sep. *fast track teachers introduced.		5 scale points' name changed (U1-U5)		
2003		£18,105 to £26,460	MA (£1,638 to £10,572) RA (£1,002 to £5,415) SA (£1,674 to £3,312)	£28,668 to £33,150	£29,757 to £47,469	£31,416 to £88,155
		*separate pay scale for teachers and heads in Inner London introduced				Pay spine with 43 spine points (L1-L43).
2004		£18,558 to £27,123	MA (£1,638 to £10,572) SA (£1,716 to £3,396)	£29,385 to £31,602	£30,501 to £48,657	£32,202 to £90,360
		*separate pay scales for teachers and heads in Outer London and Fringe Area introduced. *Chartered London Teacher status introduced	RA abolished (?)	Pay scale with 3 scale points (U1-U3)		
2005		£19,161 to £28,005	MA (£1,638 to £10,572) SA (£1,773 to £3,507) TLR1 (£6,500 to £11,000) TLR2 (£2,250 to £5,500)	£30,339 to £32,628	£31,491 to £50,238	£33,249 to £93,297
		*Excellent teachers' status introduced	Teaching and Learning Responsibility Payments (TLR) with two levels introduced			
2006		£19,641 to £28,707	SA (£1,818 to £3,597) TLR1 (£6,663 to £11,275) TLR2 (£2,306 to £5,638)	£31,098 to £33,444	£34,083 to £51,819	£34,083 to £95,631
			MA abolished (?)		New pay spine with 18 spine points (AST1-AST18)	
2007		£20,133 to £29,427	SA (£1,866 to £3,687) TLR1 (£6,829 to £11,557) TLR2 (£2,364 to £5,778)	£31,878 to £34,281	£34,938 to £53,115	£34,938 to £98,022
2008		£20,627 to £30,148	SA (£1,912 to £3,778) TLR1 (£6,997 to £11,841) TLR2 (£2,422 to £5,920)	£32,660 to £35,121	£35,794 to £54,417	£35,794 to £100,424

Source: constructed from related-year Blue Books

Appendix 5.17. Main arrangements of PM in 2001/2006 Regulations

	2001 Regulations	2006 Regulations
Used terms	Appraisal, appraisers, appraisees	Performance management, reviewers, reviewees
PM body	The governing body (GB) for a community, voluntary, foundation, community special, foundation special school; the LEA for a maintained nursery school and unattached teachers.	As in 2001 Regulations (Governors must establish a written performance management policy)
PM cycle	One year cycle (except in the first year)	As in 2001 Regulations
Selection of appraisers	Appointment of an external adviser by the GB for the appraisal of the headteacher.	
	Appointment of two or three governors by the GB to be appraisers for the headteacher.	
	The headteacher appoints as appraiser for other teachers, a teacher at the school who may be the headteacher.	The headteacher is the reviewer for all other teachers at the school and may delegate his duties to the line manager.
3 PM stages (Planning)	Objectives should be agreed at the planning meeting, and relate to school leadership and management and pupil progress (heads); developing and improving the teacher's professional practice and pupil progress (teachers). Other issues may be raised after the meeting.	Objectives, performance criteria, classroom observation, other evidence, support, and timescales should be agreed at the planning meeting. Lunch breaks and PPA time must not be used for the meeting. Consideration of a satisfactory work/life balance.
(Monitoring)	Minimum of one occasion of classroom observation. No limit, no protocol and no restrictions on other evidence or those supplying it.	Classroom observation protocol. Classroom observation should be conducted by a qualified teacher no more than 3 hours per cycle Written feedback within 5 days. Evidence can be provided by only those with direct professional knowledge.
(Reviewing)	Review performance against objectives	Review performance against the performance criteria established at the outset
Use of statements	Inform pay decisions	Basis for recommendation for pay progression for eligible teachers

Source: constructed from 2001/2006 Regulations, DfEE (2000e), RIG (2006)